



**OREN**CLOUD

DIALLER V214

# **MANAGER MANUAL**

**OCDialler powered by Vicidial**

**By ORENCloud**

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# INTRODUCTION

This manual is meant as a resource for Contact Center Managers and System Administrators to better understand how Dialer works, and to learn how to use all of its features correctly as well as answer questions as to why things work the way they do within Dialer and its management interfaces. It is expected that you have thoroughly read through the Dialer Agent manual before reading this manual. This manual is current as of the 2.14-879a version of Dialer /astGUIclient.

## ***What is Dialer ?***

Dialer is a Contact Center solution that allows agents to log into a web-based agent screen and take inbound and outbound calls as well as place outbound calls manually and from a list and handle inbound emails and customer website chats in a queue. The agent logs into one campaign and can also take calls or emails/chats from one or more in-groups(or inbound queues) at the same time they are placing/taking outbound calls. Dialer can function as an ACD, Predictive Dialer and can do many of the functions of a standard PBX as well. There are thousands of features and options available within Dialer , and they are covered here in this manual.

## ***What is a Dialer manager?***

A Dialer manager is a person who adds, modifies or deletes users, campaigns, lists, inbound groups(or queues), DIDs, Call Menus(or IVRs), add voicemail boxes, configure phones and manage the music-on-hold and audio prompts in the system as well as other items within the Dialer system. They also control the call pacing and other campaign settings while a campaign is running in the contact center. A manager can look at performance reports, modify individual customer lead information, listen in on agent phone calls and do many other functions that are needed to run a contact center effectively.

## ***How do the manager administration screens work?***

The Dialer manager administration page(/dialer /admin.php) gives links to modify and monitor many aspects of how the Dialer systems run. From here you can view real-time reports and modify many kinds of settings. The screen is a fairly basic web page and can be accessed from almost any web browser and even most web-enabled mobile cellphones.

As of the writing of this manual (version 2.14-879a), the Dialer manager administration screens are available fully translated in English, Spanish, Italian, Greek, German, French and Brazilian Portuguese.

The next section of this manual contains tutorials that will show you step-by-step how to set up and use the Dialer Contact Center Suite. The section following the Tutorials will give a basic overview of Outbound dialing regulations in the USA(United States of America), UK(United Kingdom) and Canada, including USA Federal government FTC regulations and various state regulations. The section following the regulations section will go into detail about how most of the manager features work with a description of every screen in the manager sections of the Dialer management interface.

## **What is new in version 2.14-879a?**

In this latest version of Dialer here is a list of just a few of the new features we have added since the last manual release(2.14-854a):

1. Added "Pre-Filter Recent Call" DID feature, to be able to filter out inbound calls based on the caller phone number and whether it had been called(or had called in) within the last X number of days.
2. Added the "Inbound DID Detail Report" to the Admin Utilities page.
3. Added Beta support for ConfBridge Asterisk Conferencing engine. See the "/extras/ConfBridge" directory for more information.
4. Added Beta support for VERM(the Dialer Enhanced Reporting Module), accessible from the "Reports -> Admin Utilities" page.
5. Added User Group "Script Override" option, with per-campaign activation.
6. Added "Webphone Settings" option to Phones, allows for more WebRTC config options to be set through a Settings Container.
7. Added "Agent Call Hangup Route" campaign settings, allowing you to send calls that an agent is finished with to a Call Menu, In-Group or a pre-recorded message before hanging up the call.

NOTE: After upgrading your system, be sure to set each dialer to "Rebuild conf files" = 'Y' for this feature to work properly.

8. Added instructions and scripts for creating a Gateway Recording server  
See the GATEWAY\_RECORDING\_SERVER.txt doc for more info.
9. Added the ability to have multiple "No Agent Call URL" entries for a single Campaign/In-Group/List, by putting "ALT" in the No Agent Call URL field on the Campaign, In-Group, List modify screen. Just like how it works with Dispo Call URL currently.

10. Added new User Group “Script Tab Frame Location” allowing the script tab to extend to the far left side of the screen.
11. Added new campaign setting “Max Logged-In Agents”, allowing you to set a maximum number of agents that can be logged into this campaign at any time.
12. Added list option for “Dial Prefix Override”.
13. Added a “color chooser” for the In-Group Color and Screen Colors fields. Also added color hex code validation to those fields.
14. Added “Invalid Phone Number Replacement” option to the Web Lead Loader, allowing you to replace an invalid phone\_number lead value with either the alt\_phone or address3 value in the same lead.
15. Added optional “Agent Login Kick-all” system setting which hangs up any channels that were already in the agent session before the agent is placed into the session.
16. Added “User Codes Admin Pulldown” allowing only User Level 9 users to modify the User Code field on the User Modify page, and it will change the User Code field to a pulldown menu.
17. Added "Show Confetti" campaign setting, allowing for confetti to be shown to agents when they disposition a call as a SALE and/or a CALLBACK flagged status.
18. Added "Abandon Check Queue" feature, to catch dropped Call Menu calls that are tagged with a Lead ID. For more information, see the bottom of the INBOUND\_CALLBACK\_QUEUE.txt document.
19. Added "Asterisk Restart URL" to the Modify Servers page, this can send a URL request any time Asterisk is auto-restarted on that server.

# TUTORIALS

The following Tutorials assume that your system has been fully set up by a System Administrator with all optional components installed. Each Tutorial assumes that you have read this manual and can build on each previous tutorial.

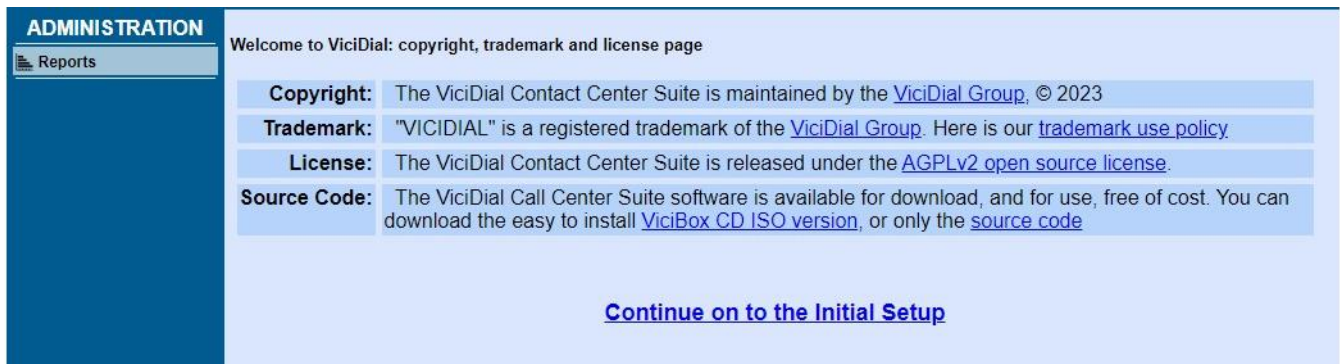
Before starting the tutorials, you most likely have the default login account (6666) and password (1234), and you will need to go into the User Modification screen and make some changes:

1. Go to [http://server-address/dialer /admin.php](http://server-address/dialer/admin.php) in your web browser, and login with your user / password (6666 / 1234).
2. Click on the MODIFY link for your account on the Users list screen: 6666
3. Change all of the Admin Interface Options to "1" to enable them so that you can have access to all pages in the admin sections. Do NOT change the user level to 1, it has to stay at 9 for you to be able to have access to all administration functions.
4. It is strongly recommended that you change your user password as well while you are in this screen.
5. Be sure to click the SUBMIT button near the bottom of this screen so your changes will go into effect.

Now you can edit just about anything in the administration web interface, now on to the tutorials!

## A. Initial Welcome Screen and Dialer Setup

Figure 1. Initial Dialer Setup and Welcome Screen



After the dialer is finished installing, you can access the main login screen by opening a web browser and entering either the local IP, public IP, or DNS address; depending on how your install was configured by your administrator. Dialer will first redirect you to the login screen. Click on “Administration” and it will prompt you for the default Dialer administrator login:

Login: 6666

Password: 1234

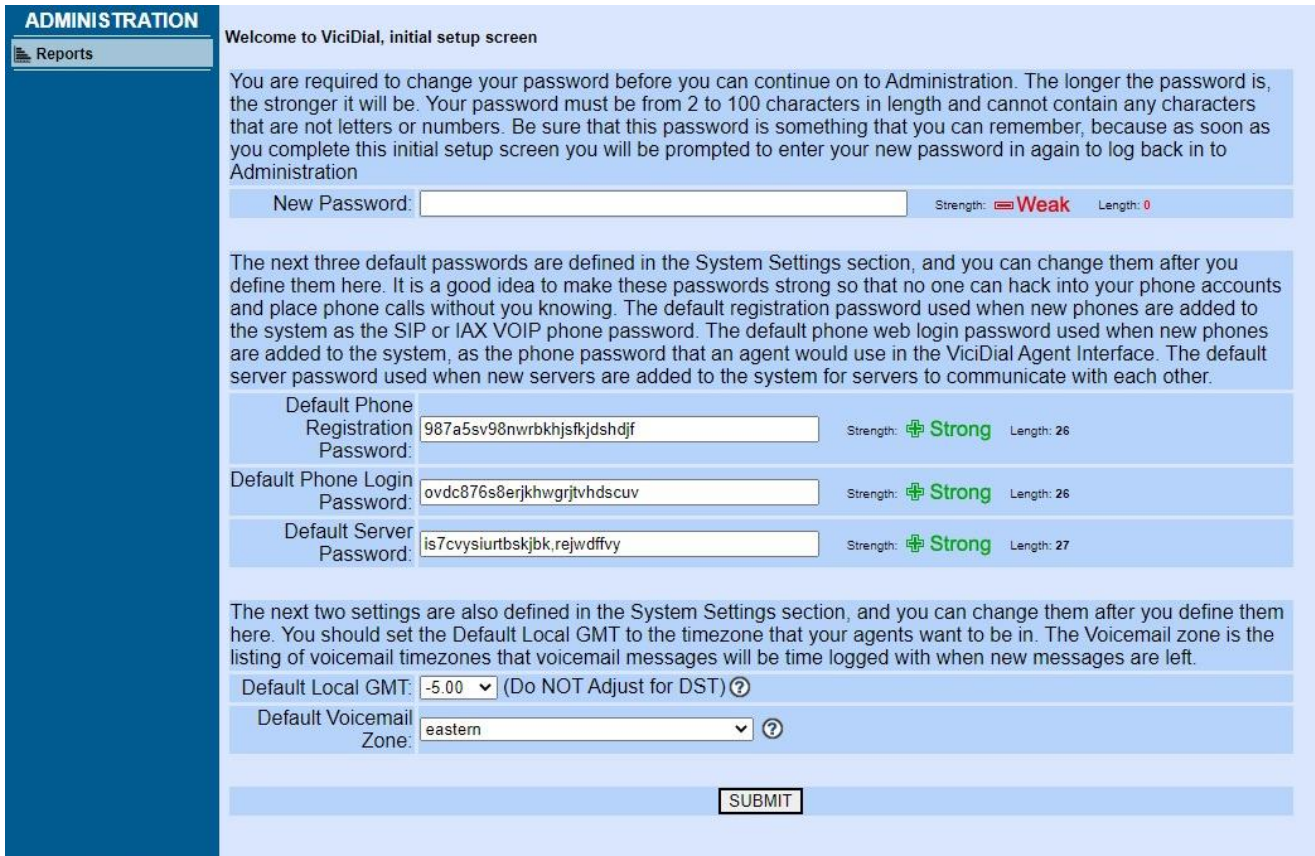
Once you've logged in it will immediately direct you to the Dialer Welcome Screen. This displays our Copyright, Trademark, license, and a link to our source code. Select "Continue to Initial Setup"

NOTE: Dialer contains several security features. The optional password encryption features have been developed for the agent and admin web interfaces. While not enabled by default, they are fairly easy for a Dialer administrator to activate. For instructions refer to “ENCRYPTED\_PASSWORDS.txt” in our document repository at:

[http://dialer.org/docs/ENCRYPTED\\_PASSWORDS.txt](http://dialer.org/docs/ENCRYPTED_PASSWORDS.txt)

Additional security changes to the agent interface include freezing a user's account for 15 minutes after 10 failed login attempts. This freeze can be overridden by a manager going to that user's Modify User page and clicking the SUBMIT button.

Another optional security feature for admin web screen users is Two-Factor Authentication, which adds a required second step to the admin web screen login process through a method other than a password, such as: an Email, Phone Call or Text-Message(SMS). This 2FA auth also lasts only a set amount of time(defined in System Settings[number of hours, from 1-9999 hours]), or until the user logs out. Currently, 2FA is not available or affected by agent screen logins. There are example screenshots of the user Two-Factor Authentication(2FA) Login process at the end of this manual in the Appendix. For more information see the 2FA document, [http://dialer.org/docs/2FA\\_TWO\\_FACTOR\\_AUTHENTICATION.txt](http://dialer.org/docs/2FA_TWO_FACTOR_AUTHENTICATION.txt)



**Figure 2. Initial Dialer Setup Screen**

The Setup Screen will prompt you to set several defaults before allowing you to finish logging into the dialer.

- New Password: This field prompts you to immediately change the password of 1234 for the 6666 user. It should be complex enough to be secure, the longer your password is, the better. (there is a password strength indicator to provide assistance).
- Default Phone Registration Password: This will be the default registration password suggested by the system, each time a Phone is created in the dialer (See tutorial B for more information).
- Default Phone Login Password: This will be the default login password suggested by the system, each time a Phone is created in the dialer (See tutorial B for more information).
- Default Server Password: This will be the default password suggested by the system, each time a new server is added to your Dialer cluster.
- Default Local GMT: This is the local time, in GMT, from where the server will be located. Please do not adjust for Daylight Savings Time.
- Default Voicemail Zone: This will be the default timezone suggested by the system, each time a Phone or general voicemail box is created. This also ensures that the time is accurate, even if the dialer is in a different time zone than the agents.

## **B. Add a new SIP or IAX phone to the system**

This tutorial goes over the steps needed to create a phone account entry in the system that you can configure a soft-phone (computer based phone) or SIP-based hard-phone (a separate physical phone) to use.

For Soft-phones, we usually recommend the IAX soft-phones Zoiper (<http://www.zoiper.com>) and KIAX (<https://sourceforge.net/projects/kiax/>) because IAX is a native protocol to Dialer and it can go through firewalls easier than SIP and it uses less bandwidth than SIP. Some SIP soft-phones that will work are Xlite and Eyebeam (Zoiper can also do SIP as well as IAX). As for hard-phones: Polycom and Snom are recommended, but Linksys/Cisco and Grandstream should also work.

1. Go to the Dialer administration page, go to the ADMIN section, click on PHONES and click on the ADD A NEW PHONE link
2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:
  - phone extension: 201
  - dialplan number: 201
  - voicemail box: 201
  - outbound callerid: 7275551212
  - <we will leave phone and computer IP address fields blank>
  - server ip: 10.10.10.15 (set this to your server ip)
  - agent screen login: 201
  - login password: test
  - registration password: test
  - status: ACTIVE
  - active account: Y
  - phone type: SIP
  - full name: sip201
  - <we will leave company and picture fields blank>
  - client protocol: SIP
  - local gmt: -5 (GMT timezone, you should NOT include adjusting for Daylight Savings Time)  
(0 is the UK, +1 is most of Europe, -5 is EST in the USA, -8 is PST in the USA)

NOTE: The “Password strength” display next to the password fields will give you a good indication of how secure the password you entered will be. If possible, you should try to use lower case and upper case letters as well as numbers in a password.

NOTE: for additional security, change “Phone Context” to *phones*. This disables the ability for agents to make calls directly from the phones, they must log into a campaign in the dialer. This also adds another layer of security against hackers that may attempt to register their own phones to your dialer.
3. Click the submit button to create this phone record. After one minute, the phone will be active in the system.

NOTE: if you are using a phone outside of a local network, we would strongly recommend changing the “Registration Password” field for enhanced security. This field is what you would use as the phone secret or password when you register it on your soft-phone or hard-phone.

4. Go to the Agent's phone and configure the server(or proxy) for the same IP address as you selected above in step 2 for Server-IP, and the login(username) is the Extension as defined above in step 2 and password(secret) is defined as the “Registration Password” field in the Phones entry, then click to “Register” if that option is available, or restart the phone or application.
5. Have the agent log into the Dialer agent interface script with the phone login(Login) of "201" and phone password(Login Password) of "test".
6. Within a few seconds the agent's phone should ring and they will be logged into Dialer and can proceed as normal to take calls. If your system uses an embedded web phone, then you will need to click on a link on the screen to log that web-based phone into your session.

**NOTES:**

- You can also use phones entries to live monitor through the Real-time report. An example of this is given in Tutorial Q.
- If you need to add Channelbank or FXO/FXS phones, you will need to coordinate with your systems administrator to set up the zaptel/dahdi conf files properly as well as adding the dialplan entries to connect to the channelbank agent phones. There are sample zaptel.conf and zapata.conf files included with Dialer for these kinds of connections, as well as sample dialplan entries in the extensions.conf sample files.



## C. Add a new Carrier trunk to your system

This tutorial goes over the steps needed to create a new Carrier trunk entry that will allow calls to come into your Dialer server from the PSTN and be dialed out by your Dialer server to go to the PSTN.

NOTE: This only works for SIP or IAX carriers, not standard T1/E1/PRI/POTS telco lines, those require extra hardware and must be configured manually by a systems administrator (see more notes on this at the end of the tutorial). If you are using a Hosted Dialer service that provides carrier services (like vicihost.com) then you can skip this section.

1. Go to the Dialer administration page, go to the ADMIN section, click on CARRIERS then click on the ADD NEW CARRIER link

2. For this tutorial we will use the following values for the fields on the ADD A NEW CARRIER form:

Carrier ID: NEWSIP

Carrier Name: Dialer SIP carrier

Registration String: register => newsip:test@10.10.10.15:5060

<we will leave the Template ID field blank>

Account Entry: (see notes at the end of this tutorial for more information)

```
[testcarrier]
disallow=all
allow=ulaw
type=friend
username=testcarrier
secret=test
host=dynamic
dtmfmode=rfc2833
context=trunkinbound
```

Protocol: SIP

<we will leave the Globals String field blank>      Example value: "SIP/testcarrier"

Dialplan Entry:

```
exten => _91NXXNXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXX,2,Dial(newsip:test@10.10.10.15:5060/${EXTEN:2},,tTor)
exten => _91NXXNXXXXXX,3,Hangup
```

Server IP: 10.10.10.15 (set this to your server ip)

NOTE: Some carriers may not require the Registration String, or the username & password in the Account Entry field.

3. Click submit to create this Carrier record, wait for one minute and the carrier record should be active. In order to check whether the carrier account is registered or active you or your system administrator would need to log into the Asterisk CLI using a terminal program. To check registration simply type "sip show peers" or "iax2 show peers" to see the accounts that are set up on the system. Be sure to set Active=Y on this page when you are ready to use this carrier, or the carrier will not be enabled for this server.

#### Account Entry Notes:

- “disallow=all” clears the preferred codecs list, you then specify the codecs you want to allow, in this instance we have chosen to only allow “ulaw”
- “type=friender” allows calls in from the carrier as well as out through the carrier
- “context=trunkinbound” this is the context in the dialplan that will receive inbound calls from this carrier
- If you need to add E1/T1/PRI/POTS/FXO/FXS lines, you will first need a reliable telco connection card for your computer, we recommend Sangoma cards(<http://www.sangoma.com>), but Digium or Rhino will usually work as well. You will need to coordinate with your systems administrator to set up the zaptel/dahdi conf files properly as well as adding the dialplan entries to dial out these PSTN lines. There are sample zaptel.conf and zapata.conf files included with Dialer for these kinds of connections(/docs/conf\_examples/zaptel... and zapata...), as well as sample dialplan entries in the extensions.conf sample files:

confirm the group you have set in zapata.conf and that it matches the TRUNK global variable line in extensions.conf:

```
TRUNK=Zap/r1
TRUNKX=Zap/r2
```

Then uncomment the dialing lines(this example is dialing through line group 2 in zapata.conf):

```
exten => _91NXXNXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXX,2,Dial(${TRUNKX}/${EXTEN:1},,To)
exten => _91NXXNXXXXXX,3,Hangup
```

## **D. Create a campaign, load leads, add a list, add users and start dialing.**

This tutorial covers going from a base Dialer setup, to agents dialing outbound on a live campaign.

1. Click on the CAMPAIGNS link at the top of the page to get to the CAMPAIGNS section and click on the ADD A NEW CAMPAIGN link
2. We will set the fields in the ADD A NEW CAMPAIGN form to the following values:
  - Campaign ID: TESTCAMP
  - Campaign Name: Test campaign for Dialer Active:  
Y  
<we will leave park extension, park filename and web form blank for this tutorial>
  - Allow Closers: Y
  - Hopper Level: 5
  - Dial Method: MANUAL
  - Auto Dial Level: 0
  - Next Agent Call: oldest call finish
  - Local Call Time: 9am-9pm  
<we will also leave voicemail, script and get\_call\_launch blank for this tutorial, there is a detailed explanation of all fields in the Dialer CAMPAIGNS section of this manual>
3. Click submit to create this new campaign
4. Now that the campaign TESTCAMP has been created, you can see the Detail View of the Campaign Modification screen with many more options that can be set for the campaign. We will leave everything in default settings and move on to loading leads.
5. You now need to create a LIST to import your customer leads to. Click on the ADD A NEW LIST link.
6. For this tutorial we will fill in the following add list fields with these values:
  - List ID: 107
  - List Name: test list
  - Campaign: TESTCAMP
  - Active: Y
7. Click submit to create the LIST.
8. To get to the lead loading page, click on the LISTS link at the top of the screen to get to the LISTS section, then click on the LOAD NEW LEADS link to get to the 4th generation lead loader. From here you can import leads in the basic text pipe-delimited or tab-delimited format, a CSV file or a simple Excel spreadsheet. For this tutorial we will use the default tab-delimited text file.

NOTES: For the web-based lead loader, a tab-delimited or pipe delimited text file must end with “.txt”, a CSV(Comma Separated Values) file must end with “.csv” and an Excel file must end with either “.xls” or “.xlsx”. If you are loading a lead file that has commas in the fields, or you are having issues loading a CSV file, then you should try formatting the file as a Tab-delimited .txt file.

9. The standard format of this lead file is:

1. Vendor Lead Code - shows up in the Vendor ID field of the GUI
2. Source Code - internal use only for system and database administrators
3. List ID - the list number that these leads will show up under
4. Phone Code - the country code prefix - 1 for US, 44 for UK, 61 for AUS, etc
5. Phone Number - at least 7 digits long and no more than 16 digits long.
6. Title - title of the customer - Mr. Ms. Mrs, etc...
7. First Name
8. Middle Initial
9. Last Name
10. Address Line 1
11. Address Line 2
12. Address Line 3
13. City
14. State - limited to 2 characters
15. Province
16. Postal Code
17. Country
18. Gender (M/F/U)
19. Date of Birth (YYYY-MM-DD)
20. Alternate Phone Number
21. Email Address
22. Security Phrase
23. Comments
24. Rank
25. Owner

Here is an actual record from the test lead file packaged with the Dialer release(test\_Dialer\_lead\_file.txt):

```
100001|10001|107|1|7275551213|MR|JOHN|Q|PUBLIC|249 MUNDON ROAD|MALDON|FL|||33709|
USA|M|1970-01-01|7275551212|test@test.com|nothing|COMMENTS|1|Southeast
```

NOTE: New in the 2.4 release are Custom List Fields, allowing you to add new fields that you can define in the Administration web interface, and then load data into those custom fields through the web-based lead loader. To do this you must select “Custom Layout” when loading leads.

10. Click on the “Browse” button on the lead import page and select the file to import on your computer then click submit.

11. The “List ID Override” pulldown indicates which of the existing lists the leads will be imported into.

12. For dialing in the USA and Canada this field should be set to 1. The phone\_code field is required for Dialer to work properly.

13. If you are using the standard Dialer field order as mentioned above, then you should select the “Standard Dialer ” file layout option. If you need to map the fields before importing the leads then you should select the “Custom Layout” option.

14. If you would like the lead-loader to check for and remove duplicate records as it is loading, then select the “CHECK FOR DUPLICATES BY PHONE IN LIST ID” option in the Lead Duplicate Check menu.

NOTE: If you are loading a large number of leads (tens of thousands or more in a single file), then

using a duplicate check will significantly slow down the loading of your leads through the web-based lead loader. If you need to do a duplicate check on a large number of leads then you should consider using the Command-Line lead loader or setting up an FTP lead loader drop box.

15. “USA-Canada Check” will verify the “Phone Number” field to ensure the area code is valid for either the US or Canada.

16. If you are loading leads for the USA and you have zip codes in your lead file, you have the option of selecting the “POSTAL CODE FIRST” option in the Lead Timezone Lookup menu. Using this option will give you more accurate time zone coding of your lead file than just using area code to determine timezone.

NOTE: There is also an optional paid lookup method using area codes and phone prefixes that can give you slightly better accuracy for setting of the timezones for leads. For more information on this contact the Dialer Group at [www.dialer.com](http://www.dialer.com)

17. If the leads loaded properly, you will see a count of the number of leads imported in a green font at the bottom of the page.

18. Now click the BACK TO ADMIN link to get back to the administration screen, then click the LISTS link to go to the LISTS section. Select the list that you just imported the leads into. You should now see the stats of the list in a table at the bottom of the screen. The number of leads you loaded should appear as a status of NEW.

19. Now that you have successfully imported leads, you need to create a Dialer user group to put your agents into. Click on the USER GROUPS link at the top of the screen to get to the User Groups section, then click on the ADD A NEW USER GROUP link to get to the new user group form page.

20. For this tutorial we will fill in the following add user group fields with these values:

Group: AGENTS

Description: Dialer AGENTS

21. Then click submit to add the user group and you will see the full modify-user-group screen. For this tutorial we will leave the “Allowed Campaigns” section with only ALL CAMPAIGNS checked.

22. Now that you have successfully created an agent user group, you need to create some Dialer user accounts to allow agents to login to the Dialer client application and place calls. Click on the USERS link to get to the Users section, then click on the ADD A NEW USER link to get to the new user form page.

23. For this tutorial we will fill in the following add user fields with these values:

User Number: 7777

Password: 1234

Full Name: test agent

User Level: 1

User Group: AGENTS

<we will leave phone login and phone password blank for this tutorial>

24. Click submit to add the user, and you will see the full modify-user screen. For this tutorial we will leave the rest of the fields at their default values.

25. Now that we have users added, we need to check that there are leads to dial in the hopper for the campaign. Go to the CAMPAIGNS screen and click on the link to the TESTCAMP campaign modification screen.

26. Toward the bottom of the screen you should see a count of leads in the hopper. If there are no leads in the hopper, something is either wrong with the leads you've loaded, or there is something wrong with your hopper loading script. In either case contact your system administrator.

27. Now that you have leads in the hopper, you should have your agent log into the Dialer client application: <http://server-address/dialer/welcome.php>

NOTE: if the phones are always going to be assigned to a specific computer you may want to create a bookmark or shortcut for the agent login screen with a pre-populated phone login. To do this just use “pl” and “pp” for the phone\_login and phone\_password fields:

Dialer.php?pl=phone1&pp=test

28. On the agent login screen you will need to enter in the phone login and phone password for the phone that the agent will be using (you should have a list of the phone login and password for each of your stations from your system administrator) then click submit.

NOTE: if you need to set up a phone on your system, see Tutorial B above

29. You will then need to enter in your username(7777) and password(1234) and select your campaign(TESTCAMP) then click submit.

30. You should now be logged in as agent 7777 and your phone should ring to place you into the Dialer session

31. Since the campaign is set to a dial level of zero (0), you are in manual dial mode and will need to click the DIAL NEXT NUMBER button to call your first customer.

32. The customer's information should now appear and you will hear the call ringing.

33. When you are done with the call, click on the HANGUP CUSTOMER button to get to the Disposition screen and then pick a disposition to terminate the call as.

34. After placing a live call you can now click on the LOGOUT link in the top right corner of your Dialer client page to properly log out of the system. At this time your phone connection should be hung-up.

35. Go to the LIST modification screen back in the administration web page to select the list you dialed and see the status counts have changed. There should now be a lead that has the status you selected when you dispositioned your test call.

NOTE: After you call through a list once, you need to reset the list in the list modification screen

before those leads can be called again. To reset a list, go the List Modification screen, change the “Reset Lead-Called-Status for this list” pulldown menu to Y, then click submit. The exception to this would be if you have enabled List Recycling within the campaign, which allows you to attempt some leads more than just once before resetting the list. Resetting a list will NOT automatically dial all of the leads again, only the leads that match the dial statuses that you define in the campaign screen will be dialed the second time. Then to dial the leads a third time, you must reset the list again.

## ***E. Change your outbound dialing campaign to use Predictive Dialing***

This tutorial will take the TESTCAMP campaign you set up in Tutorial D and explain the way to start dialing outbound predictively, and how to modify the campaign fields to tune the dialer to the way you want to be dialing.

1. Go to the Campaign Detail screen for your TESTCAMP campaign.
2. Change the Dial Method to ADAPT\_TAPERED. This will change your Dial Level automatically to a 1.0 and it will never drop below that as long as you are using this Dial Method. Also, you will not be able to change what is in the dial level field manually while you are using an ADAPT\_ dial method unless you check the ADAPT OVERRIDE check-box which will allow you to force a change in dial level even if you are in an ADAPT dial method.
3. Leave the “Available Only Tally” field set to “N”. You would only want to set this field to “Y” if you were dialing on a campaign with a very long pitch, or if you wanted extra assurances against dropping customer calls. Setting this field to “Y” will make it so that calls are only placed if there is an agent waiting for a call.
4. Set the “Drop Percentage Limit” to “3%”. This is the USA FTC limit of allowable dropped calls per 30-day average per campaign for consumer-based campaigns. You can make this higher or lower depending upon your tolerance for dropped calls. (A dropped or abandoned call is a call that is shown as answered by the carrier and was not able to be sent to an agent before the line was hung up)
5. Set the “Maximum Adapt Dial Level” to “3.0”. This number can be higher or lower depending upon the number of agents and the available number of outside lines that you have on your Dialer servers. For example, if you have a T1 with 24 channels on it and you have 6 agents that will be dialing on that server for this shift, you should set this field to “4.0” for most efficient possible dialing in Predictive mode.
6. Set the “Latest Server Time” to “2100” for a 9PM stop time in your call center. This field is only used if your Dial Method is set to ADAPT\_TAPERED and it uses the anticipated time of your last calls to calculate how strictly it should apply the target drop percentage setting. You should set this to the time when you are going to stop calling for the day.
7. Leave the “Adapt Intensity Modifier” field set to “0”. If you want the dialer to dial more aggressively then you can change this to a positive number. If you want the dialer to dial less aggressively then change this to a negative number.
8. Leave the “Dial Level Difference Target” field set to “0”. If you want to try to maintain one free agent at all times, then you should set this field to “-1”. If you want to always have one call in queue waiting for an agent, then you should set this field to “1”. You will most likely have a higher drop rate if you set this field to a high positive number.
9. Now that you have changed your Campaign Detail settings to use predictive dialing, you should log in to the Dialer agent application, wait for the phone to ring and click on the “RESUME” button to start the dialer.



10. You can now open the “Dialer Real-time” screen to see what is happening with your auto dial campaign. On this screen you will see the dial level that the campaign is currently being dialed at, as well as a lot of other important information like the following:

- Dialable leads with current campaign settings – updated once a minute
- Total calls placed for this campaign for today – updated once a minute
- Dropped calls for this campaign for today out of Answered calls – updated once a minute
- Average number of agents logged into the campaign – updated every 3 seconds
- Dial level difference (a key factor in predictive dialing) – updated every 3 seconds
- Current Dial level as adjusted by the Predictive dialer – updated every 15 seconds
- Several campaign settings that you can view including “VIEW MORE SETTINGS” section.

11. If you run over your drop limit early on in your shift, you can use the ADAPT\_TAPERED Dial Method to allow you to run over your drop limit more early on, and then get more strict as the shift gets closer to the end of calling.

#### NOTES REGARDING PREDICTIVE DIALING:

- Predictive dialing works better the more agents you have on a campaign. You should not use it for only one or two agents.
- Predictive dialing works by averaging past call performance and estimating what it will be like in the near future. Because of this it will not react within 5 seconds to a massive change in call performance, it can take 15-30 seconds to bring the dial level up or down after a drastic change.

## ***F. Create an inbound-group, point a DID at it, and take calls***

This Tutorial might possibly require either a little systems administration knowledge or some help from your Systems Administrator. Also required is a T1/E1 PRI, SIP or IAX carrier trunk line with inbound call delivery and inbound caller ID delivery. In the last tutorial you just tested an outbound campaign and now you want to have your company's 800 number point to Dialer so that you can have Agents answering inbound phone calls while also receiving caller ID information.

1. Find out from your carrier(phone line provider) what they will be sending your calls to you as. Many carriers will only send you the last 4 digits of the number that has been called. You will need this information to setup your system properly. For this tutorial we will use 800-227-7655 as the inbound 800 number and our provider will send us all 10 digits for these inbound calls (i.e. 8002277655). For more information on setting up a carrier within Dialer , take a look at tutorial C above.
2. To take inbound numbers into Dialer you will need to first setup an inbound group (or in-group) in the Dialer admin.php page.
3. Go to the INBOUND section of the Dialer admin website and click on the ADD A NEW IN-GROUP.
4. For this tutorial we will use the following values for the fields on the NEW IN-GROUP form:
  - Group ID: SALESLINE
  - Group Name: Primary Sales Line
  - Group Color: red
  - Active: Y
  - Web Form: <we leave this blank> If you have a CRM, put its search page address here.
  - Voicemail: <we leave this blank>
  - Next Agent Call: oldest\_call\_finish
  - Frontier Display: Y
  - Script: NONE
  - Get Call Launch: NONE

NOTE: the “web form” address can use custom variables just like the Script functionality can. To activate custom variables in the web form you just need to put “VAR” at the front of the URL, for example:

VARhttp://www.website.com/search.php?phone>--A--phone\_number--B--

5. We will click submit to create the in-group, then we will see the expanded options of the in-group modification screen. In these fields we can define a call-time for the inbound group as well as what to do when the call comes in after hours. Here is also where we define music-on-hold and the periodic message to be played to the customer. For more information on these options, go to the in-groups section. For the purposes of this tutorial we will leave the default values in place.
6. The next step is to create the DID (Direct Inward Dialing, also known as DDI, Direct Dial-In) entry that will send the incoming call to the in-group that we just created. To get to the ADD A NEW DID ENTRY page you need to be in the INBOUND section, then you can click on the ADD NEW DID link.

7. On the Create DID page you will put the following values in:

DID Extension: 8002277655

DID Description: Inbound 800 number

8. Then you will click submit to create the DID entry and you will see more options which you should modify:

Active: Y

DID Route: IN\_GROUP

In-Group ID: SALESLINE (this is the in-group that we created above)

In-Group Call Handle Method: CID

In-Group Agent Search Method: LB

In-Group Phone Code: 1

<we will leave the other fields in their default values>

Here is a short explanation of the options for a couple of the fields in the DID entry page:

**In-Group Call Handle Method:**

- CID - CID received, add record with phone number
- CIDLOOKUP - Lookup CID to find record in whole system
- CIDLOOKUPRL - Restrict lookup to one list
- CIDLOOKUPRC - Restrict lookup to one campaign's lists
- CLOSER - Closer calls from Dialer frontends
- ANI - ANI received, add record with phone number
- ANILOOKUP - Lookup ANI to find record in whole system
- ANILOOKUPRL - Restrict lookup to one list
- VIDPROMPT - Prompt Caller for Vendor Lead Code, create new lead
- VIDPROMPTLOOKUP - Prompt for Vendor Lead Code, search for lead in system
- VIDPROMPTLOOKUPRL - Prompt for Vendor ID, search for lead in List
- VIDPROMPTLOOKUPRC - Prompt for Vendor ID, search for lead in Campaign Lists
- 3DIGITID - Enter 3 digit code to go to agent
- 4DIGITID - Enter 4 digit code to go to agent
- 5DIGITID - Enter 5 digit code to go to agent
- 10DIGITID - Enter 10 digit code to go to agent

**In-Group Agent Search Method:**

- LO - Load Balance Overflow only (priority to home server)
- LB - <default> Load Balance total system
- SO - Home server only

9. Now that we have created an In-group and pointed a DID entry to it, go to the CAMPAIGNS section and the ADD A NEW CAMPAIGN link to create a new Inbound/Closer capable campaign.

10. For this tutorial we will use the following for the fields on the NEW CAMPAIGN form:

Campaign ID: TEST\_IN

Campaign Name: Closer and inbound campaign

Active: Y

<we will leave park extension, park filename and web form blank for this tutorial>

Allow Closers: Y

Hopper Level: 5

Auto Dial Level: 1

Next Agent Call: oldest call finish

Local Call Time: 24hours

<we will leave voicemail, script and get call launch blank for this tutorial>

NOTE: You only need to have one CLOSER-type inbound campaign for multiple in-groups. Inbound/Closer capable inbound campaigns must have a dial level of at least 1 and a dial method of RATIO, INBOUND\_MAN or any of the ADAPT\_... dial methods (anything except for MANUAL).

11. Click submit then click on the “Detail View” link near the top of the screen to go to the Campaign Detail Modification screen. Here you need to change the “Allow Inbound and Blended ” field to “Y” and the “Dial Method” field to “RATIO”.

12. Click submit and scroll down to the "Allowed Inbound Groups" section and check the box for SALESLINE then click the SUBMIT button to commit the changes.

NOTE: Every time you add a new in-group, it needs to be manually added to the campaigns Allowed Inbound Groups list if you want to be able to take calls from that new in-group in the campaign.

13. Now that you have your in-group set up, you should have your agent log into the Dialer client application: [http://server-address/dialer /welcome.php](http://server-address/dialer/welcome.php)

14. On the agent login screen you will need to enter in the phone login and phone password for the phone that the agent will be using (you can look the phone login and phone passwords up in the admin.php → Admin → Phones section) then click submit.

15. You will then need to enter in your username (7777) and password (1234) and select your campaign (TEST\_IN) then click submit.

16. You should now be logged in as agent 7777 and your phone should ring to place you into your Dialer session

17. Because you logged into an inbound/closer-enabled campaign, you should now see a green screen with the listing of all in-groups. Click on the SALESLINE group in the left side column and then click SUBMIT at the bottom of the screen. There is also a BLENDED check-box on this green screen. You would select that if you want to do blended calling where outbound calls are placed from that campaign while agents are also taking inbound calls.

18. Since the campaign is set to a dial level of one (1) you are in auto dial mode and will need to click the RESUME button to make yourself available to take inbound calls.

19. When a call comes into the 800 number, the customer's caller ID and possibly name or location should appear in the Dialer agent screen fields as well as the status bar at the top changing to the color red (which we set in the in-group screen earlier).

20. When you are done with the call, click on the HANGUP CUSTOMER button to get to the Disposition screen, and then pick a disposition to terminate the call.

21. After receiving and processing a live call you can now click on the LOGOUT link in the top right corner of your Dialer client page to properly log out of the system. At this time your phone connection should be hung-up automatically.

## ***G. Set up a remote agent to be able to take calls from an Outbound Campaign or an Inbound Ingroup.***

This feature in Dialer allows remote agents to login at the beginning of the day to take inbound, outbound, or blended calls; until they log back out and deactivate their agent session. This is a good tool for sales people on the road or tech support where a technician may not be in the office and on the office phone system for the entire day or anytime where the agent would need to take calls, has access to a phone, but no access to a computer. If recording is enabled for both the User & Campaign (either ALLCALLS or ALLFORCE), then the remote agents will be recorded also.

1. Go to the REMOTE AGENTS section of the Dialer admin website and click on the ADD NEW REMOTE AGENTS.
2. For this tutorial we will use these values for the fields on the NEW REMOTE AGENTS form:
  - User ID start: 7777 (this is the existing ID we created in Tutorial B)
  - Number of Lines: 1
  - Server IP: select your active server
  - External Extension: 917275551212 (this is the number you would dial from the Dialer system to get to the phone you want to call. It needs to contain the carrier prefix + 1 + the area code & phone number.)
  - Status: INACTIVE (this is what we change to ACTIVE when we are ready to take calls, and back to INACTIVE when we do not want to take calls anymore)
  - Campaign: TEST\_IN
  - Inbound groups: check the SALESLINE check box (for outbound only dialing, do not select and Ingroup.)
3. Have the agent login to the vdremote.php page to activate their session to take calls:
  - [http://server-address/Dialer /vdremote.php](http://server-address/Dialer/vdremote.php)
  - change the status from INACTIVE to ACTIVE and click SUBMIT
  - NOTE: This screen also allows for viewing of call information when calls come in.
4. When a call comes in to the SALESLINE in-group number and the 7777 agent is the next to take a call, a call will be placed to the "external extension" of the remote agent and the call will be passed to that line upon connection.
5. The remote agent can do things like view caller ID of the caller and disposition the call in the vdremote.php screen if they want to and have access to a web browser while on a phone call.
6. When the remote agent is done taking calls for the session, they just need to login to vdremote.php, change their status to INACTIVE and click SUBMIT. The deactivation of the account can take up to one minute.

## ***H. Set up the Audio Store, upload an audio prompt and record a prompt over the phone***

The Audio Store is used to keep all of the audio prompts in a central location on your Dialer system, then allow you to select from a list the audio prompt you want to play in each of the prompt fields in the Dialer Call Menu, In-Group, Music-On-Hold, Campaign and other sections.

Depending on how your system was installed and set up, you may or may not already have the Audio Store activated. For this tutorial we will assume that the Audio Store is not activated.

1. Go to the “Admin” section of the Dialer Admin website and click on the “System Settings” link in the sidebar.
2. Set the following fields:
  - Central Sound Control Active = 1
  - Sounds Web Server = <the server portion of your admin web address, i.e. 192.168.1.2>
  - Active Voicemail Server = <select the first, main or only Dialer Asterisk server>
3. Click the “Submit” button at the bottom of the page, then click on the new “Audio Store” link in the sidebar on the left side of the screen.
4. On the Audio Store page you can upload audio files from your computer to the Dialer system, as well as see the current audio files that are in the system. We recommend using only PCM 16bit 8k WAV files (i.e. demo.wav). After two minutes, the uploaded audio file should be copied to all of your Dialer servers that are active on this system.
5. To record an audio prompt from a phone that is registered on the system, dial 8168 and follow the instructions for recording a message (the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001). After two minutes this recording should be available in the Audio Store.
6. Now when you go to a Call Menu, In-Group, Music-On-Hold or another page that has a field with an “audio chooser” link next to it, you will be able to see the available audio prompts, sort them by filename, size and age, play the audio prompts to hear what they sound like and click on a prompt to fill that field with the prompt that you selected. When first opening the “audio chooser” the newest upload files will be at the top.

## ***I. Set up your outbound campaign to do Answering Machine Detection(AMD)***

Answering Machine Detection(AMD) gives you the ability to send more live-customer calls to agents on an outbound campaign instead of sending them calls that only have voicemail or answering machines on the other end. One downside of using AMD is that it adds processing time to all calls being sent to your agents, not just the ones that have answering machines on the other end. Because of this we do not recommend using AMD on most campaigns. Instead, we recommend setting the “Dial Timeout” to 22-26 seconds, to avoid when most voicemails & answering machine are set to pick up. Also, AMD is not perfect and may need to have it's settings tuned to the kind of leads you are dialing or the kind of telecom lines you dial through.

Another method of Answering Machine Detection(AMD) that used to be available for use with Dialer was the Sangoma Netborder CPD(Call Progress Detection) which was a paid-for per-channel licensed solution that could give you up to 97% AMD accuracy as well as lower your dropped calls rate. Unfortunately, Sangoma stopped selling and supporting this solution.

If you do not have a default Dialer installation or a VICIBox Server ISO install of Dialer, this Tutorial could require either a little systems administration knowledge or some help from your Systems Administrator. You also need to make sure that the optional AMD Asterisk application is loaded on your Asterisk server or this feature will not work(this is installed standard with the VICIBox Server ISO Installer).

1. Make sure that the following two sections are present in your dialplan (extensions.conf) file:  
(if your system is a default or ViciBox Server ISO install, these are already set up)

```
; Dialer _auto_dialer transfer script AMD with Load Balanced:
    exten => 8369,1,Playback(sip-silence)
    exten => 8369,2,AGI(agi://127.0.0.1:4577/call_log)
    exten => 8369,3,AMD(2000|2000|1000|5000|120|50|4|256)
    exten => 8369,4,AGI(VD_amd.agi,${EXTEN})
    exten => 8369,5,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
    exten => 8369,6,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
    exten => 8369,7,Hangup

; this is for playing a message to answering machine forwarded from AMD in Dialer
; audio recording used are those that you recorded through 8168
    exten => 8320,1,AGI(VD_amd.agi,${EXTEN}-----YES)
    exten => 8320,2,Hangup
```

2. If you had to add the dialplan entries, then make sure you either restart asterisk, type "dialplan reload" on the Asterisk CLI, or go to the Admin -> Servers entry and just click submit to initiate a new Asterisk dialplan reload.

3. Open the Dialer admin web site (Dialer /admin.php) and go to the Campaign Detail modification page for the TESTCAMP campaign.

4. To activate AMD you will need to change the "Campaign VDAD exten" to 8369 to have calls go through the AMD-enabled call processor.

NOTE: You must NOT use the MANUAL or INBOUND\_MAN dial methods, AMD will not work in those dial modes.

5. If you want to leave a message on the calls that are detected to be Answering Machines then you will switch the "AMD send to vm exten" field to Y and enter into the "Answering Machine Message" field a pre-recorded audio prompt filename to play to the Answering Machine while it is recording. For this tutorial we will use vm-goodbye, or you can choose another prompt from the "audio chooser" link next to the field. You will need to make sure that you have recorded a customized audio recording to be played to put in this field, we often recommend having the message play twice (recording the message twice) if it is not too long to make sure the customer can listen to the entire message at least once. The message should be recorded in GSM format 8k-8bit mono or WAV format PCM 8k-16bit mono. Another option for this message is to use a Dialer -attached phone to quickly record a prompt by dialing 8168 and following the instructions to recording a message (the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001) and simply place the prompt ID (like 85100008) into the "Answering Machine Message" field directly, or selecting it from the "audio chooser" link. For more information on the Audio Store and using custom audio prompts, see Tutorial H above.



## ***J. Set up an auto-dial campaign to dial without any live agents and play a message***

If you are doing a customer reminder/notification outbound dialing campaign or a political/non-profit broadcast dialing campaign you may want to be able to dial a list of numbers and play a message for them when the customer side of the call picks up the phone. These kinds of campaigns can be set up a few different ways depending upon how you want the message to be played on the other end.

For this tutorial we will use the TESTCAMP campaign that was set up with leads loaded from tutorial D. We will also be using the remote agent that we set up in tutorial G to enable dialing without a live agent being logged in.

1. First you need to select how you would like the message to be played once the customer side has picked up the phone. You can customize each of these to your own needs, but the basic choices are: play message immediately, play message after waiting for silence on customer side for a specified period of time or full answering machine detection.

### **Play Message Immediately -**

This is the simplest one to set up. You can simply use one of the easy-prompts (851XXXXX) for this kind of playback and no dialplan editing is necessary. The downsides of this method are that the message will start playing before the customer even says hello and in the case of Answering machines the message will have the beginning cut off. Also, there will be no status change for the lead in the system if the full message is played unlike with the other two methods. If using this method we usually recommend that you record your message twice in the recording file so that any portion of the message not heard at the beginning of a call will be played again. It is also advisable to wait at least 2-3 seconds before saying your message on the recording to allow for at least a minimal greeting time from your customer before you start delivering your message.

### **Play Message After Waiting a Set Number of Seconds -**

This method is more complicated than playing immediately because you do have to edit your dialplan (extensions.conf) to get it working. This method will wait for a specified amount of time before starting to play the message. This will not usually start to play a message until after a person has said hello. The downsides to this method are that any delay in playing a message and some customers will hang up the phone and with answering machines you will probably miss some of the beginning of the recording on their machine. If using this method, we usually recommend that you record your message twice in the recording file or you enter the Playback of the recording file twice so that any portion of the message not heard at the beginning of a call will be played again.

### **Play Message After Waiting For Silence on the Line -**

This method also requires you to edit your dialplan (extensions.conf) to get it working. This method will wait for a specified amount of silence on the line before starting to play the message. This allows for some detection of Answering Machines and will not usually start to play a message until after a person has said hello. The downsides to this method are that any delay in playing a message will cause some customers to hang up the phone and with answering machines you will probably miss some of the beginning of the recording on their machine. When using this method, we usually recommend that you record your message twice in the recording file or you enter the Playback of the recording file twice so that any portion of the message, not heard at the beginning of a call, will be played again.

### **Full Answering Machine Detection -**

This method is able to be set up using only the Admin web interface, no manual dialplan editing necessary. With this method you can more accurately leave messages on answering machines, although this is still not an exact science and may require some customizing of the AMD settings. The downsides to this method are that any delay in playing a message and some customers will hang up the phone and with answering machines you still have the possibility of missing some of the beginning of the recording on their machine. If using this method we usually recommend that you record your message twice in the recording file so that any portion of the message not heard at the beginning of a call will be played again.

Another method of Answering Machine Detection(AMD) that was available for use with Dialer was the Sangoma Netborder CPD(Call Progress Detection) which was a paid-for per-channel licensed solution that could give you up to 95% AMD accuracy. Unfortunately, Sangoma stopped selling that product in 2017.

2. The next step is to make the recordings and/or configuration changes to your dialplan (extensions.conf) needed to accomplish the message playback method you have selected.

### **Play Message Immediately -**

Use the easy-prompt process to record your new prompt. Dial 8168 on your phone connected to your Dialer server. You will be prompted for an ID (which is 4321 followed by the pound key). After logging in, you will hear the recording instructions; following the beep you can start recording your message. We recommend that you wait 2-3 seconds after the start of recording to begin speaking so that the message doesn't start playing as soon as a person picks up the phone. We also recommend reading your message twice on the recording to make sure your customers will hear the message in it's entirety. When you are done recording, press the pound key. You will then be presented with three options: press 1 to save the prompt, press 2 to listen to the prompt you just recorded or press 3 to re-record. Once you accept the recording, the filename of the recording will be played back to you twice (recording filenames start at 85100001). You can then place this number in the "External Extension" field of your remote agent modification screen to send calls immediately to this recording and then will be hung up when the recording file has finished playing. In the List modification page, for the leads that you will be calling, you will only see the following statuses when using this method:

- B - Busy,
- NA - No answer(Ring-no-answer, Disconnect, Invalid)
- NEW – Lead has not been called
- QUEUE – Call was picked up and started playing message

### **Play Message After Waiting a Set Number of Seconds -**

Use the easy-prompt process to record your new prompt. Follow the same procedure as the above step for this only you don't need to delay the beginning by 2-3 seconds. Take your prompt number and put it into the "Playback" lines as shown in the dialplan (extensions.conf) entries below:

(if your system is a default, these are already set up)

```
; this is for playing a message to answering machine forwarded from AMD in Dialer
exten => _7851XXXXX,1,WaitForSilence(2000,2) ; AMD got machine. leave message
exten => _7851XXXXX,2,Playback(${EXTEN:1})
exten => _7851XXXXX,3,AGI(VD_amd_post.agi,${EXTEN:1})
```

```
exten => _7851XXXXX,4, Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8364 (for the BROADCAST setting) and set the "External Extension" in the Remote Agent screen to 8320 (or the extension you have put the entries above into). Now when the call is answered the status of the lead will change to "PU", and after the recording is played the first time, the status of the lead will be changed to "AL" and the recording will be played again just to ensure the customer has heard it.

### **Play Message After Waiting For Silence -**

Use the easy-prompt process to record your new prompt. Follow the same procedure as the above step for this only you don't need to delay the beginning by 2-3 seconds. Take your prompt number and put it into the "Playback" line as shown in the dialplan (extensions.conf) entries below:

(if your system is a default, these are already set up)

```
exten => 8320,1,WaitForSilence(2000,2)
exten => 8320,2,Playback(85100001)
exten => 8320,3,AGI(VD_amd_post.agi,${EXTEN})
exten => 8320,4,Playback(85100001)
exten => 8320,5, Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8364(for the BROADCAST AGI script) and set the "External Extension" in the Remote Agent screen to 8320(or the extension you have put the entries above into). Now when the call is answered the status of the lead will change to "PU", and after the recording is played the first time, the status of the lead will be changed to "AL" and the recording will be played again just to ensure the customer has heard it.

### **Full Answering Machine Detection -**

Use the easy-prompt process to record your new prompt. Follow the same procedure as the above step for this, except you don't need to delay the beginning by 2-3 seconds. Take your prompt number and put it into the "Playback" line as shown in the dialplan (extensions.conf) entries below:

(if your system is a default, these are already set up)

```
exten => 8369,1,Playback(sip-silence)
exten => 8369,2,AGI(agi://127.0.0.1:4577/call_log)
exten => 8369,3,AMD(2000|2000|1000|5000|120|50|4|256)
exten => 8369,4,AGI(VD_amd.agi,${EXTEN})
exten => 8369,5,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
exten => 8369,6,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
exten => 8369,7, Hangup

exten => _8320*.,1,AGI(VD_amd.agi,${EXTEN})-----YES)
exten => _8320*.,2, Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8369(or whatever extension you defined for those lines), set the "Answering Machine Message" field to the audio prompt that you want to be played and set the "AMD Send to VM exten" field is set to "Y". Also, the "Waitforsilence options" can be used to have the playback of the message wait for a set number of timed silence once or twice as well as a maximum wait time before playing the prompt(setting this field to "2000,2,30" would mean waiting twice for 2 seconds of silence before playing, and waiting no more than 30 seconds total). As soon as the AMD detects the answering machine, the status will be changed to "AA", and as soon as the call is sent to a recording for playback, the status will be changed to "AM". Now after the recording is played completely for the first time, the status of the lead will be changed to

"AL" and the recording will be played again just to ensure the customer has heard it.

NOTE: The "Answering Machine Message" field is able to be set up as a Cepstral Text-to-speech(TTS) prompt, meaning that you can take information from the Dialer list and read it back within the message that is being played. For more information on TTS functionality, see the chapter on Cepstral TTS further down in this manual.

3. To set the Remote Agent up and start dialing first go to the Remote Agent Modification screen. If you are using Full Answering Machine Detection you will need to set the "External Extension" field to 8320, for the play-message-immediately method this field can be populated with anything and for the other two methods this field should be populated with 8320(or whatever extension you used for Playback).
4. To start dialing you need to change the status to ACTIVE and click submit.
5. When you are finished dialing you need to change the status to INACTIVE. This may take a minute to stop dialing.

## **K. Set up a “press-1” type, or survey, outbound dialing campaign**

For this tutorial we will be adding the ability to dial out and have the customer presented with a question to which they can respond by pressing a phone button(DTMF) key before the call is sent on to an agent or another destination. It should be mentioned that if you are planning on doing this kind of calling to consumers in the USA, as of September 1, 2009 you will have to have written permission from each person you are calling allowing you to do so according to FTC regulations. For more information on this, go to the FTC regulations section of the manual which is located after the Tutorials or go to the FTC website at <http://www.ftc.gov> .

1. Go to the Campaign Detail screen of the TESTCAMP campaign and click on the SURVEY sub-menu link in the third row from the top of the screen of links.

2. We will be filling in the fields with the following values:

- Survey First Audio File – 85100008 (this would be one of the audio prompts you recorded)
- Survey DTMF Digits – 1238 (These are the allowable digits the customer can press)
- Survey Not Interested Digit – 8 (Must be one of the DTMF digits above)
- Survey Opt-in Audio File – 85100009
- Survey Not Interested Audio File – 85100010
- Survey Method – AGENT\_XFER (to send the customer to an agent after the survey question)
- Survey No-Response Action – OPTOUT (If customer does not press anything, call sent through)
- Survey Not Interested Status – NI (status to put in system if customer presses NI digit)
- Survey Response Digit Map – 1-DEMOCRAT|2-REPUBLICAN|3-IND|8-NI|X-NONE|

This is a pipe-separated list of the possible DTMF choices and what they mean

<We leave Campaign Recording Directory blank we are not using CAMPREC\_60\_WAV>

<We will leave Voicemail blank since we are not using VOICEMAIL method>

<We will leave the third and fourth set of options blank as well>

NOTE: for a more in-depth explanation of these fields, go to the Campaign screen section of the manager manual.

NOTE: The audio prompt fields in this section are able to be set up as a Cepstral Text-to-speech(TTS) prompts, meaning that you can take information from the Dialer list and read it back within the message that is being played. For more information on TTS functionality, see the chapter on Cepstral TTS later in this manual.

3. Now that the campaign options are set, click on the Campaign Detail screen and change the VDAD exten to 8366, or another extension set that uses the agi-VDAD\_ALL\_outbound.agi script with the SURVEYCAMP flag(or 8374 if you are doing TTS prompts) Also, make sure that your Campaign's Dial Method is set to RATIO and your dial level is set to “1”.

4. Now the campaign can be run as normal, except that when a customer Answers, they will be played the first prompt, and will be expected to press a digit to indicate their response to the question. If they do not press a digit, and the No-Response action is set to OPTOUT, they will be sent on to an agent after the timeout. If they do not pres a digit, and the No-Response action is set to OPTOUT, then the customer line will be hung up. The customer responses will be stored in the security\_phrase field.

NOTE: It is also important to mention that the response rate on these types of campaigns is significantly less than when a human agent answers the phone immediately. Usually you will need to dial at least ten times as many lines to keep agents on the phone when doing a press-1 campaign like this.

5. If you want to ask more automated questions after the first question, then you can set the “Survey Method” to CALLMENU and point the “Survey Call Menu” option on this screen to the second question that you want to be answered by your survey takers. In that Call Menu, you will want to enable the “Log Key Press” option, and set the “Log Field” to the dialer \_list field that you want the response to the second question to be stored in.

## ***L. Set up blended in/outbound calling with your inbound-enabled campaign***

For this tutorial we will be adding the ability to dial out from the inbound/closer-enabled campaign that we created in tutorial F.

1. Make a new LIST for these new leads. We will use list ID 108 for this tutorial.
2. Go to the LISTS section of the Dialer admin pages and load leads into a new list just like we did in step 5 of tutorial D.
3. Set list 108 to active and go to the Campaign Modification page for the TEST\_IN Inbound-enabled campaign.
4. Set the local call time to 9am-9pm so that we do not place calls out after acceptable hours.
5. Make sure the dial level is set to 1 and the dial\_method is set to RATIO, or one of the ADAPT... dial methods, for the TEST\_IN campaign.
6. Go to the user modification page for user 7777 and change the "Closer Default Blended" field to "1" so that the check box for blended calling is selected by default when this agent logs in.
7. Login to the agent interface as user 7777 and select SALESLINE to take calls from, then click submit.
8. Click on the RESUME button and if there are no calls coming in you will start to dial outbound calls. If an inbound call comes in it will be queued and then sent to you after you finish the initial outbound call.
9. If you wish to stop dialing you can simply change the list of leads to inactive(set active to "N") or log out and back in and de-select the BLENDED check box at the bottom of the green inbound-group selection screen.

NOTES: If you want Inbound calls to take priority over Outbound calls, then you need to set the "Queue Priority" of the In-Groups to a higher value than the campaign has. We usually do not recommend doing this because outbound calls will not usually hold on the line waiting for an agent like an inbound caller will.

You may also want to allow agents to take inbound calls while manually dialing through a list. For this you would need to use the INBOUND\_MAN dial method in your campaign and leave the dial ratio set to 1.

## ***M. Add a Dialer External-user Agent on their home phone***

This tutorial goes over the steps needed to create an EXTERNAL phone entry that will allow an agent to log in as a Dialer user from their home phone or mobile phone.

1. Go to the Dialer administration page, go to the Admin → PHONES section and click on the ADD A NEW PHONE link
2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:
  - phone extension: E7777
  - dialplan number: 917275551212 (this is where you put the agent's phone number as you would dial it from a phone on your phone system)
  - voicemail box: 0
  - outbound callerid: 7275551212
  - <we will leave phone and computer IP address fields blank>
  - server ip: 10.10.10.15 (set this to your server ip)
  - agent screen login: E7777
  - login password: test
  - registration password: test
  - status: ACTIVE
  - active account: Y
  - phone type: external
  - full name: ext agent
  - <we will leave company and picture fields blank>
  - client protocol: EXTERNAL
  - local gmt: -5 (GMT timezone, this does NOT include adjusting for Daylight Savings Time)
3. Click submit to create this phone record and logout of the Dialer admin interface.
4. Have the agent log into the agent interface with the phone login of "E7777" and phone login password of "test".
5. Within a few seconds the agent's phone should ring and they will be logged into Dialer and can proceed as normal to take calls.



## ***N. Add a DID and point it to go to a specific logged-in Dialer Agent***

With Dialer DIDs you have several choices in where to send calls. One of those options is to send a call to go to a user that is logged in as a Dialer agent in the agent interface. The example below assumes that the phone number 727-555-6666 is incoming on one of your carrier trunks, and that the carrier delivers calls to that number with 7275556666 as the inbound DID.

1. The first step is to create the DID entry that will send the incoming call to the agent. To get to the ADD A NEW DID ENTRY page you need to be in the IN-GROUPS section, then you can click on the ADD NEW DID link.
2. On the Create DID page you will put the following values in:
  - DID Extension: 7275556666
  - DID Description: Direct agent extension for user 6666
3. Then you will click submit to create the DID entry and you will see more options which you should modify:
  - Active: Y
  - DID Route: AGENT
  - User Agent: 6666
  - User Route Settings In-Group: AGENTDIRECT
  - User Unavailable Action: VOICEMAIL
  - Voicemail Box: 6666 <you need to go to Admin → Voicemail to create this voicemail box>
  - <we will leave the other fields in their default values>

In the above example, the call will go into the AGENTDIRECT in-group where it will wait until the drop timeout of that In-Group and if the agent is still not available the call will be directed to the Voicemail box 6666. You can also send the call to another in-group or even an extension instead of sending it to voicemail. You can set up multiple AGENTDIRECT in-groups to be able to use different settings for different groups of AGENTDIRECT calls. They just need to have AGENTDIRECT at the beginning of the in-group name, such as AGENTDIRECT2, AGENTDIRECTA, etc...

4. Click submit to commit changes to the DID and the settings will be live. Now test out the new DID routing by calling the number and see if the call routes to the agent. If no agent is logged in, you can at least check the Real-Time Report to see that the call is waiting in queue.
5. For an agent to be able to take these calls they have to log into a campaign that has “Allow Inbound and Blended” set to Y as well as having an AGENTDIRECT in-group set as an allowable in-group for the campaign that they are logged into.
6. When the agent logs into agent interface they will need to select an AGENTDIRECT in-group to take calls from, and they will need to be in READY or CLOSER status (not PAUSED) to be able to accept these calls.

## **O. Add a Call Menu(or IVR) to an Inbound DID and inbound group**

A Call Menu (otherwise known as an IVR [Interactive Voice Response]) gives the callers a recorded menu of routing choices. They press the corresponding button on the keypad, and Dialer 's Call Menu routes them accordingly. For the example below, we will create a Call Menu that allows callers to go to a sales or technical support queue.

1. The first step is to create the CALL MENU entry that will play the audio prompt to the caller and offer them options of where the call is to be routed. To get to the ADD A NEW CALL MENU ENTRY page you need to be in the INBOUND section, then you can click on the ADD NEW CALL MENU link in the bar on the left side of the page.

2. On the Create CALL MENU page you will put the following values in:

Menu ID: WELCOME\_MENU

Menu Name: General welcome menu

3. Then you will click submit to create the CALL MENU entry and you will see more options which you should modify:

Menu Prompt: welcome|for-sales|press|./digits/1|for-tech-support|press|./digits/2

Menu Invalid Prompt: invalid

Menu Repeat: 2

Option: 1 <select "1" from the pull-down menu>

Description: Sales

Route: INGROUP

In-Group: SALESLINE

Handle Method: CID

List ID: 998

Option: 2 <select "2" from the pull-down menu>

Description: Tech Support

Route: INGROUP

In-Group: SUPPORT <You will have to create this In-Group>

Handle Method: CID

List ID: 998

<we will leave the other fields in their default values>

Click SUBMIT to save your changes, then wait one minute for your changes to go into effect

NOTE: in any Call Menu field that has an "audio chooser" next to it, you can put multiple audio file names in the field separated by pipes "|" just like the example above.

4. The next step is to create the DID entry that will send calls to the main inbound number to this new Call Menu

5. Click on the "Add A New DID" link in the left sidebar. On the Create DID page you will put the following values in:

DID Extension: 7275553000

DID Description: Main Number Route to Call Menu

6. Then you click “submit” to create the DID entry and you will see more options which you should modify:

Active: Y

DID Route: CALLMENU

Call Menu: WELCOME\_MENU

<we will leave the other fields in their default values>

NOTE: You need to wait up to one minute after you click the SUBMIT button for your changes to a Call Menu to go into effect.

## ***P. Add a “If you know the extension...” option to a Call Menu using AGENTDIRECT***

In this tutorial we will create a way for calls to go directly to agents using Dialer through the AGENTDIRECT in-group, if they are unavailable the call can go to their voicemail if the Agent has a voicemail box defined in their User account. This function will be added as an option to the WELCOME\_MENU Call Menu that we just created in the tutorial above.

NOTE: This tutorial has changed significantly from the one in the previous 2.2.1 release. Now you can restrict transfers to only agents that are logged in if you like, and the system will validate for active agents as well.

There are two different methods to configure this particular call flow; either creating a Custom Dialplan Entry, or using the AGI scripting. We'll explain how to configure both.

### **Custom Dialplan configuration:**

1. Click on the “Admin” menu on the left sidebar, then click on the “System Settings” link below that
2. Change the field “Allow Custom Dialplan Entries” to “1” then click SUBMIT
3. Go back to the WELCOME\_MENU Call Menu that you created (In-Groups → Show Call Menus → Modify WELCOME\_MENU)

4. Add another audio file to the Menu Prompt so that it looks like this:

```
welcome|for-sales|press|./digits/1|for-tech-support|press|./digits/2|silence|if-u-know-ext-dial
```

Or you can simply record your own audio prompt through the 8168 extension, or upload an audio file to the Audio Store (Admin → Audio Store)

5. Scroll to the bottom of the screen and enter the following into the “Custom Dialplan Entry” field:

```
exten => _XXXX,1,Playback(/var/lib/asterisk/sounds/beep)
exten => _XXXX,x,AGI(agi-AGENT_route.agi,default---AGENTDIRECT---ACTIVE)
```

NOTE: The above assumes 4-digit agent Ids (for the four X's)

The options for the “agi-AGENT\_route.agi” program are as follows:

1. the DID entry to use for In-group initiation settings ('default' is default)
2. the agentdirect in-group to send the calls to ('AGENTDIRECT' is default)
3. transfer only to ACTIVE in the system agent or Dialer LOGGED\_IN agent ('ACTIVE' is default)

6. Click submit to save your changes

7. Now you can call into the main number (727-555-3000), wait for the message to start, and then enter the 4-digit user ID of either 6666 or 7777 and you will be sent directly to their AGENTDIRECT In-Group queue, or if they are unavailable, to their User-defined voicemail box.

### **API scripting configuration:**

1. Select the WELCOME\_MENU Call Menu that you created (In-Groups → Show Call Menus → Modify WELCOME\_MENU).

2. Add another audio file to the Menu Prompt so that it looks like this:

```
welcome|for-sales|press|./digits/1|for-tech-support|press|./digits/2|silence|if-u-know-ext-dial
```

Or you can simply record your own audio prompt through the 8168 extension, or upload an audio file to the Audio Store(Admin → Audio Store)

3. In the Call Menu, select the option indicated in the recording for “Dial by Extension” and set “Route” to “AGI”.

4. Enter the following to the “AGI” field:

```
agi-AGENT_route.agi,default---AGENTDIRECT---ACTIVE---if-u-know-ext-dial---X---  
invalid---please-try-again---3---TEST_IN3---sip-silence---outside-transfer
```

NOTE: The AGI script can only route calls to the AGENTDIRECT (or AGENTDIRECT type) ingroup. The options for the AGI script are as follows:

1. ACTIVE Will transfer only to ACTIVE (any active agent in the dialer) or LOGGED\_IN (any agent currently logged into AGENTDIRECT). ACTIVE is default.
2. X = The number of digits required for user ID validation, X will allow anything, this will only be enforced if "prompt for user ID" prompt is populated.
3. invalid = audio filename for invalid selection, agent not available ( invalid is default)

5. Click submit to save your changes

6. Now you can call into the main number (727-555-3000), wait for the message to start, and then enter the 4-digit user ID of either 6666 or 7777 and you will be sent directly to their AGENTDIRECT In-Group queue, or if they are unavailable, to their User-defined voicemail box.

## ***Q. Add External Phone entry for your mobile phone then live monitor using the Real-time Report***

In this tutorial we will create a Phones entry for your cellphone (mobile phone) and log into the Real-Time Report to live monitor agents through the cellphone.

1. Go to the Dialer administration page, go to the Admin → PHONES section and click on the ADD A NEW PHONE link

2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:

phone extension: monitor\_cell

dialplan number: 917275551234 (this is where you put your cellphone number as you would dial it from a phone on your phone system 9 + 1 + area code + number)

voicemail box: 8300

outbound callerid: 7275551234

<we will leave phone and computer IP address fields blank>

server ip: 10.10.10.15 (set this to your server ip)

agent screen login: monitor\_cell

login password: test

registration password: test

status: ACTIVE

active account: Y

phone type: external

full name: manager cell

<we will leave company and picture fields blank>

client protocol: EXTERNAL

local gmt: -5 (GMT timezone, this does NOT include adjusting for Daylight Savings Time)

3. Make sure that your user account is level 7, or above, and has the settings “Agent API Access” and “View Reports” set to “1” in the User Modification page. The API should be active in the Admin → System Settings page.

4. Go to the Real-time Report and click on the “Choose Report Display Options” link at the top of the page, select the campaigns you want to view activity for, set Monitor to “MONITOR” and put the following in the Phone field “monitor\_cell” (the Phones “extension” of the phone entry you want to be called with the blind monitored session). Then click submit. For an image of this, go to Figure 54.

5. Now you will see a LISTEN column show up with the agent listings within the report. To monitor one of the agents simply click on the LISTEN link next to the User of the agent you want to listen to. This will launch a phone call to your cellphone. When you are done, simply hang up the phone and click to listen to another agent.

## R. Creating Custom Fields

In this tutorial will show you how to create custom fields. This allows you to add additional fields to the agent interface to either display customer data already loaded onto the lead, to capture new information, or even to display a default field in a new way. The fields are created on a per list basis, and can be easily copied to other lists using the “Copy Custom Fields” feature, in Lists. All custom fields appear on the “Form” tab on the agent interface.

1. To access custom fields, you will need to set “Enable Custom List Fields” to 1.
2. Then “Custom Fields Modify” will need to be enabled for the User that will be creating the custom fields. That field is located in the User modifications page, beneath “Admin Interface Options”.
3. Select “Lists”, and click on the list you wish to add a custom field to. Scroll to the bottom of the list modification page and select the link “Custom fields defined for this list:0”. Once the additional fields have been created on this list, the 0 will be replaced with the total number of custom fields.
4. Custom fields can be used to create a wide range of field types (See the Custom Fields section of this manual for more information), but for this tutorial we will create a multiple choice pulldown menu. It's a common request and is more complex than creating a simple text field.

New Field Rank: 1

New Field Order: 1

Field Label: favorite\_color - This is the unique database identifier for this custom field. After this has been submitted, this will be the only field that can not be edited.

Field Name: What is your favorite color? - This is what will appear beside the field, in the agent interface, that prompts the agent to ask for this information.

Field Name Position: LEFT - This is where the Field Name will appear, in relation to the custom field.)

Field Description: Favorite Color - The description of the field that appears in the Admin interface.

Field Help: Select from pulldown - These are the additional instructions the agent will see if they select the “help” link next this custom field.

Field Type: SELECT - This determines the type of field this will be. I've selected SELECT to create a pulldown menu of possible options.

Field Options: red, Red

blue, Blue

silver, Silver

The Field Options are entirely dependent on Field Type. For the pulldown example, each line represents a possible entry. First, is how the response will appear in the database. Then, separated by a comma, is how the entry would appear on the pulldown in the agent's interface.)

Option Position: HORIZONTAL - How the options for this custom field are arranged.

Field Size: 3 - This field will mean different things, depending on what Field Type was chosen. For MULTI, it represents the number of options that will be visible when the agent clicks the pulldown menu. In this case, I want them to see all 3 options.

Field Max: blank - Another Field that will mean different things depending on what Field Type was selected. It's not used for SELECT, so leave it empty.

Field Default: NULL - This option already placed in the field to start. If the agent does not

update this field while on the phone with the customer, this will be submitted as the response. This Field must either contain data or be NULL, but it can not be left blank. You will receive an error attempting to load leads onto a list that has left this field blank.

3. Click “submit” at the bottom of the page to create the custom field.

4. The page will re-load showing an overview of the newly created field at the top in blue. Below, in white, is an example of how the custom field would appear on the agent interface. You also have the ability to go back and edit anything but Field Label on your previous entries.

5. Now the list is ready. If you load leads onto it, using the web-based lead loader, The customer fields now appear on the load screen where you define the terms.

6. When an agent is connected to a call from a lead in this list, their interface will display all the custom fields on their Form tab.



## ***S. Brief overview of Cepstral Text To Speech software integration.***

In this tutorial will show you how to use Text to Speech as part of an outbound dialing campaign.

1. To add a TTS prompt, first go the Text To Speech page (in the Admin section) and click on the “Add A New TTS Entry”. Fill out all of the fields.
2. For TTS Text, here is a very simple TTS script that states. "If this is FIRSTNAME LASTNAME please press one. If this is not FIRSTNAME LASTNAME please hang up now." The example will play recordings for the static audio, while using lead table information to generate the TTS portion. It uses four statically recorded audio files. Which are:

if-this-is.wav

please-press-one.wav

if-this-is-not.wav

please-hang-up-now.wav

Here is the actual TTS Text:

```
<audio src='/var/lib/asterisk/sounds/if-this-is.wav' /> --A--first_name--B---- A--last_name--B--,  
<audio src='/var/lib/asterisk/sounds/please-press-one.wav' /> <audio src='/var/lib/asterisk/sounds/if-  
this-is-not.wav' /> --A--first_name--B-- --A--last_name--B--,<audio  
src='/var/lib/asterisk/sounds/please-hang-up-now.wav' />
```

3. Please note that the audio store places audio files in the /var/lib/asterisk/sounds directory. If you want to use files in a different directory you can, but you need to adjust the path accordingly. Also keep in mind that you have the voice William-8kHz install. You need to include the '-8kHz' at the end.
4. The TTS text section can use any of the Dialer Script variables that are available in the Script section.
5. Once the TTS Entry is added, go into the campaign modification page, and select the Survey link at the top. Any of the audio files can be replaced with a TTS entry. To do so, type 'TTSentry\_id' in the field. Where entry\_id is the TTS entry id you put in earlier. For instance if I named the above TTS script 'simple\_tts\_entry', I would put into the audio file field 'TTSsimple\_tts\_entry'.
6. The main thing to consider regarding TTS is that things need to be perfect in order for it to work correctly. If there are typo's in the TTS entry you can have very strange things happen.

Cepstral uses SSML for its mark up. The TTS Text section of the entry takes SSML and passes it to Cepstral. This is important when attempting more complex creations. For instance, to have it read off an account id to the caller; you need to use an SSML directive so that it does not treat it like a complete number. For example, Cepstral would normally read “12574” as “twelve thousand five hundred and seventy four”. However, if you pass it as:

```
<say-as type='acronym'>12574</say-as> it will read that as 'one two five seven four'.
```

Cepstral has a well supported forum at:  
<http://cepstral.com/support/forum/>

You can find more information on SSML here:  
<http://www.w3.org/TR/speech-synthesis/>  
[http://en.wikipedia.org/wiki/Speech\\_Synthesis\\_Markup\\_Language](http://en.wikipedia.org/wiki/Speech_Synthesis_Markup_Language)

## T. Configuring Phone Aliases

This tutorial covers setting up Phone Aliases & Agent Phones to work with them. This feature is designed to allow a multi-server cluster of Dialer to load balance the agents' phones upon login to the agent web screen. This allows admins in multi-dialer contact centers to not have to worry that the phones are spread evenly across the active servers. This is especially helpful in call centers with overlapping shifts, or whose agents' schedules often change. The agent's phone is registered to multiple dialers, when they log in, the system selects the active dialer with the lowest load. Using Phone Aliases also has the added benefit of more easily handling hardware failures, where one server in a cluster goes down, the agents on the affected server just need to log out and back in and then they are using another server in the cluster without having to change login details.

Before getting started, download and install a soft-phone that support multiple lines. Zoiper Classic is a recommend free soft-phone that (depending on the version) can support between 2-4 registered lines (the Zoiper webphone is not free, but does support an almost unlimited number of DIALER phone accounts).

For this tutorial we will be setting up Phone Alias 101, and the Phones associated with it. For brevity this will cover just two servers.

1. Go to the Dialer administration page, go to the ADMIN section, click on PHONES and click on the ADD A NEW PHONE link.

2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form (the rest to the fields are fine by default):

- phone extension: 101

- dialplan number: 101

- voicemail box: 101

- server ip: 192.168.198.1 (the example IP address of the dialer we'll refer to as "dialer A")

- agent screen login: 101a

- login password: test

- registration password: test

- phone type: SIP

Press the "Submit" button at the bottom to create the phone.

3. Now we'll create a second phone on the other dialer (what we'll refer to as "dialer B") using the following data:

- phone extension: 101

- dialplan number: 101

- voicemail box: 101

- server ip: 192.168.198.2 (the example IP address of "dialer B")

- agent screen login: 101b

- login password: test

- registration password: test

- phone type: SIP

Press the "Submit" button at the bottom to create the phone.

NOTE: If you have additional dialers (and a softphone that would support more than 2 phones registered at the same time) you could continue making phones in this fashion. The phone extension, dialplan number, voicemail box, login password, and registration password would be the same, while the server ip would be unique (one phone per server). In addition the agent screen login would also be unique, containing the phone extension with an incrementing letter added at the end (101a, 101b, 101c, 101d, etc).

4. The ADMIN section, on the Phones tab, select the “Add a New Phone Alias” link. We’ll create a new Phone Alias with the following information:

Alias ID: 101x (the Phone Alias should be the Phone Extension used for all the corresponding phones, followed by the letter “x”)

Alias Name: 101 (this required field can contain whatever is helpful to differentiate this from the other aliases)

Phones Logins List: 101a,101b (a comma separated list of each of the Agent Screen Logins for the phones created to work with this alias)

Press the “Submit” button at the bottom to create the Phone Alias.

5. The Phone Alias is ready for use. The agent will access the Agent Login, use Phone Login “101x” (matching the Phone Alias), Phone Password “test”, and their normal user login & password. After the agent selects the campaign and presses “Submit”, the system will then load balance by logging the agent into the server with the least number of non-remote agents attached to it.

## U. Configuring Email

This tutorial covers the steps for adding and configuring email support to Dialer . Email Groups allow agents to handle inbound emails, just as they would inbound calls. The incoming email automatically pulls up the customer's lead information on the agent's screen, while simultaneously locking it to keep them from receiving further calls or emails. Once they have responded to the email they will disposition the lead, like any other call, and they are immediately available for more calls or emails.

ADMINISTRATOR NOTE: This feature must be enabled in Admin/System Settings and an “E” keep alive needs to be added to ONLY ONE of the servers. The following modules need to have been installed: LWP::UserAgent, HTML::Entities, HTML::Strip, HTML::FormatText, HTML::TreeBuilder, Switch, Time::Local, MIME::Decoder, Mail::POP3Client, Mail::IMAPClient, Mail::Message, IO::Socket::SSL, MIME::Base64, MIME::QuotedPrint, ### inbound email parser (this must be added to the crontab of ONLY ONE server), \* \* \* \* \* /usr/share/astguiclient/AST\_inbound\_email\_parser.pl

For this tutorial we will be setting up Email Account 100, and the inbound Email Group to go with it. This specific tutorial shows how to configure the dialer to connect to a web mail account.

1. In Admin, select System Settings and change “Allow Emails” to 1.
2. Then “Modify Email Accounts” will need to be enabled for the User configuring email. That field is located in the User modifications page, beneath “Admin Interface Options”.
3. The next step is to create an Email Group. On the Inbound tab, Click the link “Add A New Email Group”.

Group ID - Email\_100  
Group Name - Email 100  
Group Color - orange  
Active - Y  
Admin User Group - All Admin User Groups  
Next Agent Email - longest\_wait\_time  
Get Call Launch - NONE

Then click Submit to create the Email Group.

4. Now to create an Email Account, allowing Dialer to receive emails from an outside source (mail server, Gmail, Hot mail, etc.). On the Admin tab, choose Email Accounts, and click “Add A New Account”.

Email Account ID - Email\_100  
Email Account Name - Email 100  
Active - Y  
Email Account Type - INBOUND  
Email Account Protocol - IMAP  
Email Reply-to Address - dialer @fakemail.com (your email address)  
Email Reply-to Address - imap.fakemail.com (this is based on your email provider)  
Email Account User - Dialer (this is the user name for my “ dialer @fakemail.com” account  
Email Account Password - IluvVICI (the password for my “ dialer @fakemail.com” account  
Email Frequency Check Rate - 10  
In-Group ID - Email\_100 (this is the Email Group created in step #3)

Default List ID - List\_100 (The List ID that created leads will be inserted into, if necessary)

In-Group Call Handle Method - EMAILLOOKUP

In-Group Agent Search Method - LB

Finally click Submit to create the Email Account.

4. Now that the Email Group has been built, you'll need to assign it to a campaign, so agents can login and receive emails. Click "MODIFY" next to the account you wish to add the Email Group to. In the "Allowed Inbound Groups" section, click the checkbox next to "Email\_100" to select it, and press "Submit" at the bottom. Now, when the agent logs into this campaign, they will be able to staff the "Email\_100" group and receive incoming emails.

NOTE: We have noticed some problems configuring email with some email services that do not follow email standards. When we do testing of our email configurations, we typically use a Gmail account with the authentication method set to basic. Gmail has more recently set a maximum email frequency checking limit by outside applications of no more than once per 10 minutes, so you may want to confirm that your Dialer Email Accounts "Frequency Check Rate" setting is set to 10 or higher.

There are several settings within the Gmail "Settings" screen for IMAP settings that you may need to modify to ensure that Dialer has access to your mailbox. You may need to go into your Google Account "Security" settings and enable the "Less secure app access" setting in order to use the IMAP connection for email. Also, you may also need to manually verify access a second time through Google logging in as the user through a web browser to get Dialer to be able to log in successfully.

## V. Setting Up a Ring-all Ingroup & Phone

This tutorial is for setting up an inbound In-group to ring all the agents phones at once. The first agent that answers the phone receives the call. This differs from the normal In-group settings that send the call to only one agent (depending on the Next Agent Call setting) and does not ring their phone. The ring all group should contain no more than 30 agents.

1. The inbound In-group will need to enable the Ring-all. In the Inbound tab, in Show In-Groups, select an In-Group to configure. Make the following changes to the indicated fields:

Next Agent Call: ring\_all

On-Hook Ring Time: 30 (The amount of time, in seconds, the call will ring at the agent's desks)

On-Hook CID: CUSTOMER\_PHONE (the Caller ID number displayed on the agent's ringing phone)

2. The phone needs to be configured to ring, rather than passing the call straight through to the agent. In the Admin section, Phones tab, select a phone to modify. Change the “On-Hook Agent” field to “Y” (default is “N”). Repeat this step on the phones for every agent that will staff the In-Group above.

Once the agent logs into the In-Group they are part of the ring-all group. Unlike a normal agent, their phone won't ring during the initial connection, due to the settings. Now, each time a call is routed to the In-Group, all the agents' phones will ring.

This can also be enabled for Remote Agents. In the Remote Agent section, select the Show Remote Agents tab, and choose an agent to modify. Set “On-Hook Agent” to “Y”, and indicate the “On-Hook Ring Time” in seconds. Now the Remote Agent can log into a ring-all enabled In-Group.

NOTE: Agents should staff either normal In-Groups or ring-all In-Groups, but not both at the same time. The On-Hook agent phone feature is intended for very light call volumes only, because the calls are routed slower, and the load on the system is much higher than standard call queueing to agents that are using off-hook phones.

## W. Implementing the agent\_monitor.agi script

This tutorial covers implementing the new “agent\_monitor.agi” script, replacing the “agi-phone\_monitor” script for agent monitoring. The improved feature set allows you to configure an inbound DID to serve as a secure & simple access point to call in and monitor your agents. The DID is routed through a Call Menu, which requires the caller to input their access code. The monitoring session can even restrict which agents can be listened to, based on campaign. It works in both single & multi-server cluster builds.

The Features are enabled directly on the script itself. The CLI option flags below can be used for the agent\_monitor.agi script in the up\_monitor context. Those variables are found in the portion of the script between [up\_monitor] and [up\_monitor\_exit]. (shown below):

```
[up_monitor]
exten => h,1,AGI(agi://127.0.0.1:4577/call_log--HVcauses--PRI-----
NODEBUG-----${HANGUPCAUSE}-----${DIALSTATUS}-----${DIALEDTIME}-----${ANSWEREDTIME})

exten => _X.,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => _X.,n,AGI(agent_monitor.agi,USER---N---LISTEN---${EXTEN}-----N)
exten => _X.,n,Hangup()

exten => s,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => s,n,AGI(agent_monitor.agi,USER---N---LISTEN-----N)
exten => s,n,Hangup()

exten => i,1,Goto(up_monitor,s,1)
exten => i,n,Hangup()
exten => #,1,Goto(up_monitor,s,1)
exten => #,n,Hangup()
exten => t,1,Goto(up_monitor,s,1)
exten => t,n,Hangup()

[up_monitor_exit]
```

### Script Options

**How to Look up user to monitor** - The choices are USER (user ID), PHONE (phone extension), PLOGIN (phone login), or REDIRECT (back to the menu). In the example below, the option is set to USER. (default is USER)

```
exten => _X.,n,AGI(agent_monitor.agi,USER---N---LISTEN---${EXTEN}-----N)
```

**Enable logging in the API log** - The options are Y or N. In the example below, the option is set to Y. (default is N)

```
exten => _X.,n,AGI(agent_monitor.agi,USER---Y---LISTEN---${EXTEN}-----N)
```

**Choose between Barge or Listen** – The options are BARGE or LISTEN. In the example below, the option is set to LISTEN. (default is LISTEN).

```
exten => _X.,n,AGI(agent_monitor.agi,USER---Y---LISTEN---${EXTEN}-----N)
```

**Prepopulated ID** – Allows the script to be set to monitor only one user (indicated by user ID). In the



example below, the option is set to user ID 7777. (default is disabled)

```
exten => _X.,n,AGI(agent_monitor.agi,USER---Y---LISTEN---7777 -----N)
```

**Campaign limits** – Monitoring can be restricted on a campaign basis. In the example below, only agents logged into the “TEST” and “TEST2” can be monitored. When indicating multiple monitoring campaigns, the campaigns are double-dash-delimited, i.e. "TEST—TEST2". (default is disabled).

```
exten => _X.,n,AGI(agent_monitor.agi,USER---N---LISTEN---${EXTEN}---TEST--
TEST2----Y)
```

**Play agent's User ID** – The choices are Y or N. In the example below, the option is set to Y. (default is N)

```
exten => _X.,n,AGI(agent_monitor.agi,USER---N---LISTEN---${EXTEN} ----- Y)
```

It is also possible to have different settings by duplicating the up\_monitor and up\_monitor\_exit contexts for multiple sets of monitoring.

The new agent\_monitor.agi script replaces the old agi-phone\_monitor.agi script and the dialplan entries below should replace the older dialplan entries used.

Below is the “agent\_monitor.agi” script in full. Once modified to your needs, copy the text, select Admin>System Settings, and paste it into the Custom Dialplan text box.

```
; quiet entry, listen-only, exit-on-dtmf conferences for DIALER (listen)
exten => _568600XXX,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => _568600XXX,n,Meetme(${EXTEN:2},mqX)
exten => _568600XXX,n,Hangup()

; barge, exit-on-dtmf conferences for DIALER (barge)
exten => _578600XXX,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => _578600XXX,n,Meetme(${EXTEN:2},X)
exten => _578600XXX,n,Hangup()

; quiet entry, listen-only, exit-on-dtmf conferences for DIALER (listen)
exten => _588600XXX,1,Dial(${TRUNKblind}/56${EXTEN:2},55,o)
exten => _588600XXX,n,Hangup()

; barge, exit-on-dtmf conferences for DIALER (barge)
exten => _598600XXX,1,Dial(${TRUNKblind}/57${EXTEN:2},55,o)
exten => _598600XXX,n,Hangup()

[up_monitor]
exten => h,1,AGI(agi://127.0.0.1:4577/call_log--HVcauses--PRI-----
NODEBUG-----${HANGUPCAUSE}-----${DIALSTATUS}-----${DIALEDTIME}-----${ANSWEREDTIME})

exten => _X.,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => _X.,n,AGI(agent_monitor.agi,USER---N---LISTEN---${EXTEN} ----- N)
exten => _X.,n,Hangup()

exten => s,1,Set(MEETME_EXIT_CONTEXT=up_monitor_exit)
exten => s,n,AGI(agent_monitor.agi,USER---N---LISTEN-----N)
exten => s,n,Hangup()

exten => i,1,Goto(up_monitor,s,1)
exten => i,n,Hangup()
```

```

exten => #,1,Goto(up_monitor,s,1)
exten => #,n,Hangup()
exten => t,1,Goto(up_monitor,s,1)
exten => t,n,Hangup()

[up_monitor_exit]
exten => h,1,AGI(agi://127.0.0.1:4577/call_log--HVcauses--PRI-----
NODEBUG-----${HANGUPCAUSE}-----${DIALSTATUS}-----${DIALEDTIME}-----${ANSWEREDTIME})

exten => _X,1,AGI(agent_monitor.agi,REDIRECT)
exten => _X,n,Hangup()

exten => i,1,AGI(agent_monitor.agi,REDIRECT)
exten => i,n,Hangup()
exten => #,1,AGI(agent_monitor.agi,REDIRECT)
exten => #,n,Hangup()
exten => t,1,AGI(agent_monitor.agi,REDIRECT)
exten => t,n,Hangup()

```

## **X. Setting up Cross-Cluster-Communication between two systems**

Below is a description of a simple cross-cluster feature, which is to send lead data in one direction from one cluster to another, as a phone call is sent from one cluster to another.

- A call being sent from one cluster to another will have its callerIDname as a unique identifier that will be used to look up the lead data from the originating system

- This call will go through an IAX trunk between the two systems into an internal DID on the destination cluster

Set up an IAX "carrier" on the originating cluster and an IAX "phone" on the destination cluster to link the two together.

(Note: the phone entry on the destination cluster must have the Outbound CallerID and Fullname fields blank, and the Phone Type must have "trunk" in it)

The destination phone entry needs to use "trunkinbound" as it's phone and exten context

- Agents on the originating cluster will do a blind-transfer or dial-with-customer call to a custom dialplan number that goes to the destination cluster, it is best to use an impossible number for this, something like 9998887771.

Agents should click on the "commit" link in the top right Customer Information screen before transferring the call to ensure any information that they have typed in is up to date before transferring it. This will ensure that any customer info they have altered is updated on the origination database before the destination cluster gets the call

- At the DID, the call will get sent to a Call Menu where the call will go through an AGI script

Set the prompt to "wait-moment|cm\_sc\_ccc\_lookup\_insert.agi,ccc\_test---8199"

# Flag Options: (separated by triple-pipe: "---")

# 1- container\_id for settings container with URL to send

# 2- local list\_id to insert lead into(if not populated, will use external system's list\_id for the lead)

- The AGI script will use parameters defined in a Settings Container for the URL of the originating system's Non-Agent API and credentials

The originating server will need to set up a user of level 8 with view reports and Agent API abilities, and the 'ccc\_lead\_info' API function enabled

You will need to add a Settings Container to hold the URL for the originating system to look up the lead data, something like this:

`http://server/dialer /non_agent_api.php?`

`user=6666&pass=1234&source=test&function=ccc_lead_info&call_id=--A--call_id--B--`

- That AGI script will look up the lead on the originating system using the Non-Agent API and credentials set in a Settings Container

- The originating system will validate that the caller\_code was a valid recent call before sending any data(within last 10 hours)

- If there is a match, then the AGI script will gather the default lead information, insert the information into the new system and change the callerIDname with the destination system's lead\_id included

- The call will then go to option "A" and should probably be routed to an In-Group with the handle method set to "CLOSER" so it can go to an agent

NOTE: to use Cross-Cluster-Communication features, your systems must both be running svn/trunk revision 2801 or higher.

# REGULATIONS FOR THE USA: FTC, FCC AND STATES

This section contains a brief overview of the technical issues involved in outbound dialing in the USA. We will go over the USA Federal Government's FTC and FCC regulations for outbound telemarketing to consumers and several states' additional regulations on business-related calling. It is important to note that several other countries also have regulations for outbound telemarketing, the UK and Canada for instance have rules that are very similar to those of the USA, including maintaining their own DNC lists. If you will be calling a country other than the USA, then you should contact the regulatory authority responsible for regulating telemarketing for more information on any restrictions that may apply to your type of business. The information in this manual should not be considered legal advice. If you have legal questions, you should contact a lawyer that specializes in communications law.

## ***FTC REGULATIONS***

In 2003, the FTC (Federal Trade Commission - a department of the USA federal government) launched the federal Do-Not-Call list and initiated several new restrictions on outbound calling by businesses for the solicitation of sales to consumers, called the Telemarketing Sales Rule (TSR). There were also several provisions made to allow for the outbound calling to consumers. These provisions, known as Safe-Harbor, must be followed for a company to remain compliant when outbound telemarketing directly to consumers in the USA. We will only be covering the technical-related issues here, but there are also several other issues such as misrepresentation, fraud and record retention that we will not be detailing here. In August of 2008, the FTC issued an 111-page update to the TSR that changed a few of the provisions including changing the drop rate average to being calculated for a 30 day time period instead of daily. For more information, go to <http://www.ftc.gov>

## **FTC Federal Do-Not-Call List**

The Federal Do-Not-Call list (DNC list), as of February 2012, has over 209,000,000 phone numbers in it. This is an opt-in list that is free for consumers and is maintained by the FTC. Companies who place outbound calls to solicit sales from consumers must filter their calling lists against the DNC list at least once a month. Penalties for calling customers on this list can result in thousands of dollars in fines for each violation and increased oversight from the FTC. To gain access to the list you need to register with the FTC as a Seller company. The full national DNC list with all area codes in it costs about \$14,000 per year as of September, 2006. It is illegal to share a list with another seller company or offer filtering services to other companies. There are also some loopholes or ways around having to filter your lists against the DNC list:

- If your company has a prior business relationship with the consumer (in the last 18 months for purchase or 3 months for simple information inquiry).
- If you are calling on behalf of a non-profit organization or charity with no intention to sell
- If you are calling with a survey or poll without intention to sell
- If you are calling on behalf of a political campaign (but not to solicit donations)

For Dialer , you must filter your lists before you load them into the Dialer system. There is an internal DNC feature to Dialer , but if you were to insert the entire federal DNC list into it, your system would no longer function properly.

## FTC Safe Harbor Regulations

Safe Harbor regulations are a set of requirements that companies must follow to be able to use automate dialing equipment to solicit business from consumers.

The first provision of Safe Harbor is that an outbound call must be transferred to an agent within 2 seconds of the customer finishing their greeting (“Hello, this is Bob”, 1, 2). If the call is not sent to an agent in that time, the call is considered a DROP (or an “abandoned call”) and a company is not allowed more than a 3% drop rate out of the total number of answered calls that they have placed per campaign per 30-day period. For Dialer , we recommend setting your “Drop Call Seconds” field to “5” for your campaigns. This allows for a 3 second answer and greeting, then 2 second wait time before a call is classified as a DROP in the system.

The second provision is that if a call is dropped (as defined in the second provision) you must play a message that says the name of your company, why you are calling and a phone number that the consumer can call the company back at. For Dialer , you need to set the “Drop Action” campaign field to “MESSAGE”, and the “Safe Harbor Exten” campaign field to the extension that has your safe harbor message on it in your server.

The third provision is that a company-specific DNC list must be maintained and consumers can be placed in this DNC list if they request no more calls from a company. For Dialer , you just need to set the “Use Internal DNC List” campaign field to “Y” to enable an internal DNC list.

The fourth provision is that a call must ring a minimum of 15 seconds, or 4 rings, before the company hangs the call up. For Dialer , you can set the “Dial Timeout” campaign field to a number of seconds that is higher than 15 per campaign.

The fifth and final provision of Safe Harbor is that the company must maintain records of it's calling for up to 2 years and produce those records upon request. For Dialer , these records are kept in the database indefinitely. There is an optional archiving process for call logs that may take call logs out of the easily searchable log tables, but they are still stored on the system.

## Other FTC Regulations

There are also some other FTC regulations that govern outbound telemarketing including Caller ID transmission and allowable calling times.

All outbound telemarketing calls must send an outbound Caller ID number when calling consumers. This number must be both active, and contain basic information about the company, when it is called by the consumer. It also must allow for the consumer to request to not be called again about this offer. For Dialer , use the “Campaign Caller ID” field in the Campaign Detail screen to set the Caller ID number that you want to be sent with your outbound calls in that campaign.

Another FTC rule regards local calling time. According to the FTC, no calls can be placed from businesses to consumers from the hours of 9PM to 8AM local time. There are several states that have more restrictive call times than these, and we recommend a more standard 9AM to 9PM call time range. For Dialer , you can set the local call time for a campaign in the “Local Call Time” campaign field and you can further specify day-of-the-week times and state-specific call times for your selected

call time in the CALL TIMES section of the admin.php interface.

Included in the August 2008 TSR revisions were also provisions that went into effect in September of 2009 that outlawed the use of automated dialing without calls going to an agent (including broadcast dialing, robo-calling and press-1 dialing) unless you have the expressed written permission from the person that you are calling. Also, in February of 2012 the FCC (Federal Communications Commission) also came out with similar rules for non-agent auto-dialing.

There are also many other regulations that are governed by the FTC. For more information on FTC regulations of telemarketing, please go to <http://www.ftc.gov>

## **SPECIFIC USA STATE REGULATIONS**

There are several issues involved in calling people in all 50 states in the USA that are not covered by the FTC regulations. Those involving local call times, telemarketing-prohibited holidays, state-specific DNC lists and recording-of-conversations restrictions need to be taken into consideration when you are calling those states.

### **Local Calling Times**

Several states have different allowable calling times during different days of the week and times of the day. For example, here is a listing of the state-specific call times that are built-in to Dialer and can be activated:

- **Alabama(AL)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Indiana(IN)** - Calling only allowed from 9am-8pm Mon-Sun
- **Kentucky(KY)** - Calling only allowed from 10am-9pm Mon-Sun
- **Louisiana(LA)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Maine(ME)** - Calling only allowed from 9am-5pm Mon-Sun
- **Massachusetts(MA)** - Calling only allowed from 9am-8pm Mon-Sun
- **Mississippi(MS)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Nevada(NV)** - Calling only allowed from 9am-8pm Mon-Sun
- **Pennsylvania(PN)** - Calling only allowed from 9am-9pm Mon-Sat and 1:30pm-9pm on Sundays
- **Rhode Island(RI)** - Calling only allowed from 9am-6pm Mon-Fri, 10am-5pm Sat and none on Sun.
- **South Carolina(SC)** - Calling only allowed from 9am-7pm Mon-Sun
- **South Dakota(SD)** - No calling allowed on Sundays
- **Texas(TX)** - Calling only allowed from 9am-9pm Mon-Sat and 12pm-9pm on Sundays
- **Utah(UT)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Wyoming(WY)** - Calling only allowed from 9am-8pm Mon-Sun

For Dialer , the above state call times are already included in the basic install of Dialer . All you need to do is activate them each individually in your campaign's selected call time scheme.

### **Telemarketing Prohibited Holidays and Other Prohibitions**

There are also several holidays where telemarketing is prohibited, they vary from state to state and can vary from year to year. Some examples of telemarketing-prohibited holidays are:

- **New Year's Day** - January 1 (observed), Alabama/Utah/Mississippi/Rhode Island/Pennsylvania
- **Martin Luther King Jr. Birthday** - January 17, Alabama/Louisiana/Rhode Island/Utah/Pennsylvania
- **President's Day** - February 21 (3<sup>rd</sup> Monday in February), Alabama/Utah/Mississippi/Rhode Island/Pennsylvania
- **Mardi Gras Day** - March 1 (can change every year), Alabama/Louisiana
- **Good Friday** - April 14 (changes every year), Louisiana/Pennsylvania

- **Confederate Memorial Day** - April 25(fourth Monday in April) , Alabama/Misissippi
- **Rhode Island Independence Day** – May 4, Rhode Island
- **Memorial Day** - May 30 (last Monday in May), Alabama/Louisiana/Rhode Island/Utah
- **Jefferson Davis' Birthday** - June 4, Alabama
- **Flag Day** - June 14, Pennsylvania
- **Forth of July**- July 4, Alabama/Louisiana/Rhode Island/Utah/Pennsylvania
- **Pioneer Day** – July 24, Utah
- **Victory Day** - August 9, Rhode Island
- **Labor Day** – September 6 (first Monday in September), Alabama/Louisiana/Rhode Island/Utah/Pennsylvania
- **Columbus Day** – October 11 (second Monday in October), Alabama/Rhode Island/Utah/Louisiana/Pennsylvania
- **All Saints Day** - November 1, Louisiana
- **Election Day** - November 2(always a Tuesday), Louisiana/Rhode Island/Pennsylvania
- **Veterans Day** - November 11, Alabama/Louisiana/Utah/Rhode Island/Pennsylvania
- **Thanksgiving Day** – November 25 (fourth Thursday in November), Alabama/Louisiana/Rhode Island/Utah and the day after Thanksgiving, Louisiana
- **Mrs. Rosa Parks Day** – December 1, Alabama
- **Christmas Day** – December 25(observed), Alabama/Louisiana/Rhode Island/Utah

It is also important to mention that usually following a natural disaster(such as a hurricane or flood) that states will often prohibit telemarketing in their state(or a portion of their state) following the disaster. An example of this is that for several weeks at the end of 2005 and into 2006, the state of Louisiana prohibited telemarketing after hurricane Katrina destroyed several areas within the state.

For Dialer , there is currently no method for scheduling no-calling days per state, we recommend temporarily setting a state call time record to 2400/2400(no calling allowed) for that day for the state that is affected and then activating that state call time record in your campaign's selected call time scheme.

## State-specific DNC lists

Several states maintain Do-Not-Call lists independent of the federal FTC DNC list. It is important to mention that some of these states do not send registrations on to the federal list when consumers register with the state DNC list, meaning that just because you are FTC DNC list filtering doesn't necessarily mean that you can safely call a number in a state that maintains their own separate DNC list.

To get these state DNC lists there are different requirements for each state, some require just a small fee, while others require a full registration process with a requirement for bonds to be secured before telemarketing in their state will be authorized. Check with the proper authority in the states that you wish to call consumers in to find out more about each state's DNC list.

For Dialer , this is handled like the federal DNC list, you should be pre-filtering against these lists before the leads are loaded into Dialer .



## Recording of Conversations Regulations

While there is only a requirement of single-party notification that a conversation is being recorded at the federal level, there are 12 states in the USA that have a requirement that all parties in a phone call must be notified that a call is recorded. Here is the list of those states:

- California
- Connecticut
- Florida
- Illinois
- Maryland
- Massachusetts
- Michigan
- Montana
- Nevada
- New Hampshire
- Pennsylvania
- Washington

All of the states above allow for criminal charges, and all but Montana allow for Civil penalties as well. The penalties vary from state-to-state, but often depend on what was done with the recording, if it has even been kept.

For Dialer , there are no provisions for restricting recording to specific states. We recommend either not recording, playing a pre-recorded message stating that this call may be recorded, or telling your agents to inform the customer that the call is being recorded.

## Florida-Specific Calling Regulations

Prior to 2021, Florida's Telemarketing laws were very similar to the comparable Federal laws, so they did not require much in the way of specific compliance measures. But, in its 2021 legislative session, the Florida Legislature unanimously approved an extension of the existing Telemarketing Regulation law to include several new provisions:

- Reducing call times from 8am-9pm to 8am-8pm
- Limiting the number of call attempts to three(3) per 24-hours
- Requiring "Express Consent" of the people being called by auto-dialers or using recorded messages
- Increased penalties for violations
- Some other small changes

NOTE: There are dozens of exemptions for some of the above changes. For more information, consult a lawyer that specializes in telecom law. You can read the actual text of the law at the following link: <https://flsenate.gov/Session/Bill/2021/1120/BillText/er/HTML>

In summary, as of July 1, 2021, anyone calling consumers within Florida on Native Florida Areacode Phone-Numbers(more about that part later) will now need to follow the restrictions of placing no more than three(3) calls to any single phone number for the same issue within any 24-hour period. In our research into this new restriction, we could not find any other governmental body who used the "24-hour" wording for a call attempt limit. The UK has a 72-hour ban on dropped auto-dialed calls for being re-attempted, but that is not an overall attempt limit, and was rather simple to program. But since the "24-hour" wording was used, we could not simply have affected clients use the existing "Daily Call Count Limit" features, since there would be the possibility of running over the three(3) calls per-24-

hours limit. So we had to create a whole new set of features to handle this(detailed above).

Now what about that "Native Florida Areacode Phone-Numbers" part? The law uses the wording "any area code in this state"('this state' meaning Florida) which at the time we're writing this document means the 21 area-codes assigned to the state of Florida by NANPA. Based upon our analysis, this actually leaves out the roughly 15% of Florida citizens who have phone numbers originating in other area-codes. But, this does make the determination of whether you are calling someone affected by this law to be much simpler, since we can just use the existing areacode database within Dialer (mentioned above) to look up what state the areacode of the phone numbers you are calling belongs to. Since there is some debate as to whether the phone number's area-code is the only way to determine if you are calling a Floridian, we did add some features to the "24-Hour Called Count Limit Override" to allow it to also include whether a Florida zipcode or state is defined in the lead's record to have it also follow a state rule for Florida.

The conclusion of all of this is: If you place sales calls, and you call people in Florida, you should set up your system to use the new 24-Hour Call Count Limit feature. At the very least, you should set up a "24-Hour Called Count Limit Override" with one of the "state" entries being "state => USA,FL,3" so that you are not calling any of those phone numbers more than three(3) times in a 24-hour time period.

For more information on the "24-Hour Called Count Limit" features, read the "Call Count Limits" chapter further down in this manual.

## **Oklahoma-Specific Calling Regulations**

On November 1 of 2022, a similar state of Oklahoma "mini-TCPA" law(HB-3168) that is very similar to how Florida's new law operates, went into effect. It also disallows most automated sales calls(including ringless-voicemails and SMS texts), as well as the 3-calls-within-24-hours call limit, the 8am-8pm allowed calling time, and the "express consent" provisions of Florida's law. This new law applies to any sales calls to "any area code in this state", similar to how Florida's law handles the presumption of who is an Oklahoma resident. One other provision of this law is that it prohibits any efforts to "intentionally alter the voice of the caller".

Oklahoma's new mini-TCPA law does have several additional exceptions compared to Florida's similar law though, including exceptions for Funeral Services and anyone "licensed or certified to handle pesticides" in the state of Oklahoma. For more details on this law, you can read the actual text of the law at the following link:

[http://webserver1.lsb.state.ok.us/cf\\_pdf/2021-22%20ENR/hB/HB3168%20ENR.PDF](http://webserver1.lsb.state.ok.us/cf_pdf/2021-22%20ENR/hB/HB3168%20ENR.PDF)

## **Washington-state-Specific Calling Regulations**

On June 9 of 2022, a somewhat similar "mini-TCPA" law(HB-1497) also went into effect in Washington state. This new law moves beyond just sales calls since it also includes any organization soliciting for money. The 8am-8pm permissible calling time provision from Florida's law is also present here. But, Washington's law does not have the 3-calls in a 24-hour period restriction, the requirement to get "express consent" for the person being called, or most of the long list of exemptions that Florida and Oklahoma's laws have. It does however have a requirement that callers must identify themselves and where they are calling from within 30 seconds of the call connecting, as well as this

interesting requirement:

"If, at any time during the telephone contact, the called party states or indicates they want to end the call, the telephone solicitor must end the call within 10 seconds."

There are also some additional details enacted in this law, you can read the actual text of the law at the following link:

<https://lawfilesexternal.wa.gov/biennium/2021-22/Pdf/Bills/Session%20Laws/House/1497-S.SL.pdf?q=20220525151557>

## ***FCC Regulations***

The FCC(Federal Communication Commission) has a set of telemarketing regulations that are almost identical to the regulations enforced by the FTC, but there are some small additional requirements that are of note. Amongst them are the need to offer an automated opt-out for dropped outbound auto-dial calls. This can be accomplished through sending dropped calls to a Call Menu and using the "cm\_dnc.agi" script to offer an opt-out option to the customer. More details on this are in the AGI section of the manual.

In 1991 the US Congress passed the Telephone Consumer Protection Act. The FCC specifies technical requirements for auto-dialers, fax machines, and voice messaging systems. Dialer is designed to be able to work in compliance with all FCC regulations, given the proper setup and configuration, please be aware of the laws in your area when placing calls.

## ***The TCPA, Cellphone Calling and Filtering***

As of October 16, 2013 in the USA, the FCC revised their rules on making phone calls and sending text messages to cell phones via an ATDS (automatic telephone dialing system) under the TCPA(Telephone Consumer Protection Act of 1991), and now requires prior express written consent of the person called.

The TPCA defines an ATDS as follows:

"(1) The term 'automatic telephone dialing system' means equipment which has the capacity:

"(A) To store or produce telephone numbers to be called, using a random or sequential number generator (the 'number generator storage or production clause'); and

"(B) To dial such numbers (the 'dialing clause')."

The law has been interpreted in various ways and has been both legally contested and upheld. There are 2 strategies to maintain FCC compliance with this law: only call cell phones from a dialer that has no capacity to auto-dial, or get the consent of the cellphone owners you are calling. You can secure a non-ATDS dialer from the Dialer Group, with programmatic changes to the software configuration, disabling it from operating as an auto-dialer, so that every phone call placed from the system will require human intervention. These servers adhere to one of the FCC's interpretations of the TCPA law.

If you would prefer to secure the consent, be sure to follow all the legal requirements. You will need to secure a written agreement which includes:

1. The specific caller (or callers) to whom consent is being provided.
2. The specific telephone number to be called.
3. The purpose of the calls will be for telemarketing, sales and/or service.
4. The method by which these calls will be made: calls will be placed using an ATDS (including prerecorded if applicable).
5. A statement advising that the consumer is not required to provide consent as a condition of purchase.
6. There must be an affirmative action on the part of the person giving consent to clearly indicate consent. This can be the signature of the person providing consent, which can be obtained via an electronic signature per the ESIGN Act. Verbal recorded consent can qualify under the ESIGN Act with the right verbiage and properly maintained recording files.

Using the above methods, you can be in compliance with the FCC's current interpretation of the TCPA. That only applies to FCC actions or fines, not any proceeding in civil court, where any call to a cellphone could be ruled as a violation of the TCPA depending on the judge's interpretation of the law itself.

As for how to filter cellphone numbers, with number portability this has been made a much more complex task. There are companies that offer daily, fee-based filtering services, like DNC.COM, which several of our clients use for this purpose, and can pre-filter leads before they are imported into Dialer . It is important to mention that there is no 100% accurate lookup service for cell phones, but using a specialized daily filtering service like DNC.COM is considered a “best effort” solution because you can get very close to that.

In the last release version of Dialer , we added several software components that allow for integration with DNC.COM's on-site, daily cellphone filtering database service. If you subscribe to this service then you can set the system to automatically download the batch data files nightly and have Dialer scrub for cellphones on the entire system and/or manually scrub inactive lists through an administrative web page.

The penalties for calling a cellphone with an auto-dialer without express consent are as follows: The FCC fine is up to \$16,000.00 per violation(call), with civil fines of up to \$1000.00 per call that can also be levied against the offender.

We make no claims as legal experts and advise you to use this information as a guideline and consult your own legal representation regarding compliance with this and any FTC, FCC or other applicable laws.

In July 2020, the Supreme Court of the United States finally heard a court case relating to the TCPA, specifically the carve-out exemption that Congress passed in 2015 allowing companies collecting debts backed by the federal government to not have to follow the TCPA. The Supreme Court struck down this exemption, allowing for TCPA lawsuits to proceed against companies collecting federal-backed debts.

In April 2021, the Supreme Court of the United States released a more comprehensive ruling on the

TCPA. In this unanimous ruling, the court much more narrowly defines what an ATDS is: A device that must be able to either "store a telephone number using a random or sequential generator or to produce a telephone number using a random or sequential number generator". Since Dialer does not have the capacity to generate or produce phone numbers using a random or sequential number generator, it would appear that Dialer is not considered to be an ATDS under this ruling.

Link to the April 1, 2021 U.S. Supreme Court ruling:

[https://www.supremecourt.gov/opinions/20pdf/19-511\\_p86b.pdf](https://www.supremecourt.gov/opinions/20pdf/19-511_p86b.pdf)

On November 21, 2022 the FCC released it's declaratory ruling on "ringless voicemail" products saying that they should be treated just like regular automated message phone calls, and that permission is required from the person you are calling when using them:

<https://www.fcc.gov/document/fcc-finds-ringless-voicemails-are-subject-robocalling-rules>

## ***The TRACED Act, STIR/SHAKEN and Robocall Mitigation***

In December of 2019, the TRACED(Telephone Robocall Abuse Criminal Enforcement and Deterrence Act ) Act was signed into law in the United States. This was to have been fully implemented by the end of June 2022 by all carriers handling calls within the country. The FCC is responsible for enforcement of the TRACED Act.

The main purpose of the TRACED Act is to stop phone-based fraud, specifically the "spoofing" of Caller IDs, which means sending a CallerID number out on a phone call that is not associated with the originator of that phone call. The two major new tools to facilitate this are STIR/SHAKEN and Robocall Mitigation at the carrier level.

STIR/SHAKEN is a set of protocols between phone carriers(as well as customers) that allows for the signing of individual phone calls so that the origination of where the call comes from can be validated by every carrier from origination to destination. There are 4 levels of attestation of phone calls within STIR/SHAKEN: "A", "B", "C" and ""(blank, or no attestation), here is what each of them mean:

- A, call originates on the same carrier as the CallerID number resides
- B, call originates on a different carrier from the CallerID number, but it is registered and valid
- C, no validation on the originator of the call, but the gateway carrier is valid
- No attestation, no STIR/SHAKEN validation was performed on this phone call

Robocall Mitigation is a much more fluid tool that is up to each carrier to define, and most carriers have changed their definitions of how Robocall Mitigation works since they put it into effect. The most general description of what Robocall Mitigation does is to say that it allows carriers to stop phone calls from ringing through to their customers if they think that it is a Robocall. What causes each carrier to think that a specific phone call is a Robocall depends on how each carrier defines what a robocall is. For example, some carriers will not allow any phone call with a 'C' or blank STIR/SHAKEN attestation to be sent through to any consumer phone accounts. Some other carriers will keep their own internal databases of all calls placed, and those CallerIDs that have too many phone calls to a single subscriber or group of subscribers will be either flagged on the destination consumer phone as "SCAM LIKELY"(or something similar) or they will not be passed through to the consumer at all. The thresholds on these can vary wildly even within the same carrier. For example, it might take as few as 200 phone calls or as many as 20,000 phone calls for a single carrier to flag a CallerID number, and

that flag may persist at the carrier level as few as 2 or as many as 21 days.

Systems like those described above invariably flag people and organizations that they shouldn't, like appointment reminder systems, pharmacy automated phone systems, healthcare providers and even family members which have all been victims of improper Robocall mitigation flagging. There are often no easy ways of getting your number un-flagged, although a few carriers do offer tools to facilitate that.

The plan at most carriers is that as STIR/SHAKEN is implemented in full, and the FCC more tightly enforces it's use, there will be less need for the very loose definitions of what a Robocall is, and that most carriers will validate primarily based upon attestation levels of the calls that they receive, which should hopefully catch less non-Robocall users on their wide nets.

We have helped many clients integrate with specific carrier STIR/SHAKEN call signing requirements, and we have even included implementation of the TILTX STIR/SHAKEN API protocol in code included in the Dialer codebase. For more information on TILTX, see the TILTX section further down in this manual.

# REGULATIONS IN OTHER COUNTRIES: UK, CANADA, EU AND OTHERS

In most of the countries around the world there are government regulations covering telephone call center communications. Whether it is only sales that are regulated, or other aspects, you should consult your country's regulatory authority for more information on this subject.

## ***UK Call Center Regulations***

For the United Kingdom(UK) specifically, many of the OFCOM regulations for telemarketing sales are very similar to those in the USA with the following exceptions:

1. You must not attempt to contact a customer within 72 hours of an Abandon(or DROP) where you called the customer but had no agent for them to go to and they hung up the phone. The “Drop Lockout Time” field in the Campaign Detail screen was created for this purpose. If you need this feature enabled, just change this field to “72” and click SUBMIT on the Campaign Detail screen.
2. A company is permitted to calculate the drop rate across all campaigns in the company instead of per campaign like in the USA. The “Multiple Campaign Drop Rate Group” option in the Campaign Detail screen was created for this purpose. Simply set all of your campaigns to the same drop rate group and the drop rate will be calculated across all of them instead of individually. This will give you much more consistency in dial ratios across campaigns and will help you to better stay within the legal regulations.
3. As of December 2015, OFCOM changed the way that they calculated “Drop Calls” to use a formula for the anticipated number of dropped answering machines, given the rate of agent-dispositioned Answering Machines. We have added this as an option, to use this new drop rate calculation, within Dialer on a per-campaign basis. To use this feature, you must enable in BOTH Admin → System Settings → “UK OFCOM Drop Calculation” and in the Campaign Detail option “UK OFCOM Drop Calculation”, if you want to use this method of calculating your dropped call rate. Also, all Answering Machine status that agents will use MUST have the Answering Machine status flag set to ‘Y’.

The UK also has no-call lists that companies must filter auto-dialing lists against, just like in the USA.

## ***Canada Call Center Regulations***

The regulations that went into effect in Canada in September of 2008 were modeled after the USA's FTC TSR(Telemarketing Sales Rule), complete with it's own DNC list (the DNCL) and most of the same provisions as are in effect in the USA with the following exceptions:

1. Newspapers calling to solicit subscriptions are also exempt form the new regulations, just like only charities, surveys and politicians are in the USA.
2. Request-for-information contacts may be contacted for up to six months, whereas the limit is 3

months in the USA.

3. Immediate full disclosure of the purpose of the call and who you are calling for is required in Canada, whereas it is not in the USA.

## ***European Union GDPR Regulations***

In 2018, the new EU GDPR (General Data Protection Regulation) went into effect, and we added new features in Dialer to cover some of the implementation of these regulations, below is also a brief overview of the GDPR regulations going into effect for organizations that interact with residents of the European Union as of May 25th, 2018.

The official EU GDPR website is located here:

<https://www.eugdpr.org/>

Good overview of GDPR rules and scope:

[https://en.wikipedia.org/wiki/General\\_Data\\_Protection\\_Regulation](https://en.wikipedia.org/wiki/General_Data_Protection_Regulation)

### **What is the GDPR?**

The right of access (Article 15) is a data subject right that gives citizens the right to get access to their personal data and information about how this personal data is being processed. A data controller must provide, upon request, an overview of the categories of data that are being processed (Article 15(1)(b)) as well as a copy of the actual data (Article 15(3)). Furthermore, the data controller has to inform the data subject on details about the processing such as the purposes of the processing (Article 15(1)(a)), with whom the data is shared (Article 15(1)(c)), and how it acquired the data (Article 15(1)(g)).

A right to erasure (Article 17) provides that the data subject has the right to request erasure of personal data related to them on any one of a number of grounds, including noncompliance with Article 6.1 (lawfulness) that includes a case (f) if the legitimate interests of the controller is overridden by the interests or fundamental rights and freedoms of the data subject, which require protection of personal data.

And there are many other sections not directly affecting Dialer software for affected organizations that you should read about if your organization is affected.

### **Who is affected by the GDPR?**

The regulation applies if the data controller, an organisation that collects data from EU residents, or processor, an organisation that processes data on behalf of data controller like cloud service providers or the data subject (person) is based in the EU. The regulation also applies to organisations based outside the EU if they collect or process personal data of individuals located inside the EU. According to the European Commission, "personal data is any information relating to an individual, whether it relates to his or her private, professional or public life. It can be anything from a name, a home address, a photo, an email address, bank details, posts on social networking websites, medical information, or a



computer's IP address."

### **New Dialer Settings:**

Admin -> System Settings:

Enable GDPR-compliant Data Download Deletion -This setting if enabled will allow for the complete download and/or deletion of all customer data for a particular lead, in compliance with the General Data Protection Regulation (GDPR). Default is 0 for disabled. A setting of 1 will enable downloading data, and a setting of 2 will enable not just downloading, but also deletion of data, including any recordings.

Users -> Modify User:

GDPR-Compliant Export Delete Leads -This setting if enabled will allow for the complete download and/or deletion of all customer data for a particular lead, in compliance with the General Data Protection Regulation (GDPR). Default is 0 for disabled. A setting of 1 will enable downloading data, and a setting of 2 will enable not just downloading, but also deletion of data, including any recordings. You are not allowed to set this user setting higher than the current system setting.

### **New Dialer Web Administration Features:**

On the Modify Lead Page(which you can access from either the "Lists -> Search for a Lead" page, or by clicking on a lead ID in the "User Stats" page):

At the bottom of the page, you may see these options:

GDPR compliance:

[Click here to download GDPR-formatted data for this lead](#)

[Click here to review and purge customer data on lead](#)

The "download" option will provide you with a ZIP file containing all lead and log data for the lead record in the system as well as all of the recordings that are available for the lead record.

The "review and purge" option will take you to a confirmation page where you can permanently delete the personal information that is stored in the system

NOTE: if you are not using a VICIbox 8.x or newer web server, make sure that your installation of PHP has the ZipArchive class installed:

<http://php.net/manual/en/zip.installation.php>

## **OVERVIEW OF ALL MANAGER SCREENS FUNCTIONS**

In this section you will see in-depth descriptions of all of the screens in the realm of Dialer Contact Center management. This manual will not go into great detail about the Systems Administration side of the Asterisk server or configuration files on the server, only what a manager needs to go through on a day-to-day basis.

**ADMINISTRATION**

Reports

**Users**

- Show Users
- Add A New User
- Copy User
- Search For A User
- User Stats
- User Status
- Time Sheet
- User Territories
- Overall New Lead Limits

Campaigns

Lists

Quality Control

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

VERSION: 2.14-704a  
BUILD: 190312-0828  
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**USER LISTINGS:** [show all users](#)

USER ID	USER ID -#-	FULL NAME	LEVEL	GROUP	ACTIVE	MODIFY	STATS	STATUS	TIME
8888		Admin	9	ADMIN	Y	<a href="#">MODIFY</a>	<a href="#">STATS</a>	<a href="#">STATUS</a>	<a href="#">TIME</a>
10000		test remote agent user	1	---ALL---	Y	<a href="#">MODIFY</a>	<a href="#">STATS</a>	<a href="#">STATUS</a>	<a href="#">TIME</a>

Figure 3. Users List

## Dialer USERS

The very first screen you see when you log in to the Dialer administration interface is the System Summary screen. To get to the USERS section, click on the “Users” link on the left menu. This will take you to the Users List. This is a full listing of every active Dialer user in the system with their user ID, name, user level, group and links to user stats and modification pages (to see all users just click on the “show all users” link near the top). You can also click on the USER ID (and “-#-” for numeric order), FULL NAME, LEVEL and GROUP column headers to sort the user listing by those different columns. We will first look at adding a new user.

## Adding a New User

You can get to the Add User screen by clicking on the "ADD A NEW USER" link at the top of the USERS section. As with most Dialer add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted, to save space and duplication. When adding a new user, you must make sure that you set the User Number, full name, password and user group or the submission will not be accepted. Please make sure that the User Number you have chosen does not have any spaces or punctuation, only letters or numbers. This is also a good time to mention that nothing in Dialer should contain a created “name” or “ID” that starts with “0”. Leading zeroes have been know to cause problems, so we recommend starting with positive integers. Once you create a user, you will not be

able to change that User Number unless you delete the user and re-create it again with a different User Number. You cannot have duplicate User Numbers in the system, and User Numbers must be between 2 and 20 characters in length. If you want to use features like “If you know the extension...” as mentioned in Tutorial P, or you want to use agent dial-in to allow agents to connect to the system, then the User Number must contain only numbers.

## Modify User

*(screen-shot of the Modify User screen available in the Appendix)*

For users in the User Modifications screen there are account settings, agent interface options and administration interface options.

### **Agent Interface Options**

The user interface options are settings that control the features available to an agent when they log into agent interface. These settings are refreshed by the agent only at login time, so if you make changes while an agent is logged in, they will need to log out and back in again for them to go into effect.

### **Admin Interface Options**

For Administration users that are a user level of 8 or 9, the administration options allow you to set what the managers are allowed to do in the administration interface. These settings are real-time, meaning that a manager can immediately use a new feature as soon as the feature has been enabled for their Dialer user record.

### **Descriptions of Dialer user fields**

Below is the listing of the Dialer user fields and their descriptions.

**User Number** - This field is where you put the Dialer users ID number, can be up to 20 characters in length, Must be at least 2 characters in length with no spaces or punctuation of any kind. We recommend using only digits for the User ID, especially if you will want your agents to be able to use the dial-in feature, or for your customers to use the dial-by-extension feature. We strongly recommend not reusing user accounts for different users, for reporting accuracy. To disable a user account, set the Active option to -N-.

**Password** - This field is where you put the Dialer user’s password. This must be at least 2 characters in length up to 100 characters in length, with no spaces or punctuation of any kind(Only letters and numbers are allowed in user passwords). If your agents will be using the dial-in login feature, the password also needs to be digits (numbers) only.

**Password Strength Indicator** - a visible gauge displaying the chosen password's relative security. It encourages use of upper & lower case letters and numbers, to ensure password complexity. The most secure passwords are long passwords.

**Password Encryption** - Password encryption features have been developed for the agent and admin web interfaces. It prevents the user's password from being displayed in the admin interface. The

password must be re-entered any time it is changed. This feature is not enabled in the dialer by default. For instructions refer to “ENCRYPTED\_PASSWORDS.txt” in our document repository at:

[http://dialer.org/docs/ENCRYPTED\\_PASSWORDS.txt](http://dialer.org/docs/ENCRYPTED_PASSWORDS.txt)

**NOTE:** Additional security changes to the agent and admin web screens include freezing a user's account for 15 minutes after 10 failed login attempts. This freeze can be overridden by a manager going to that user's Modify User page and clicking the SUBMIT button.

**Force Change Password** – When set to “Y” it will force the user to change their password the first time they log into either the Administration webpage or the Agent Screen. Default is “N”.

**Last Login Info** – This field includes the datestamp of the last time this user logged into the system, as well as the current number of failed login attempts and the IP address of the computer used in the last login attempt.

**Full Name** - This field is where you put the Dialer user's full name. Must be at least 2 characters in length.

**User Level** - This menu is where you select the Dialer user's user level. Must be a level of 1 to log into Dialer , Must be level 2 or higher to take inbound calls, Must be a user level of 7 or higher to view reports. Must be user level 8 or greater to get into the admin web section. Inside of the administration screen if the user has a user level of 8, they will only be able to alter the options of users with a lower user level than theirs. Only users with the user\_level of 9 can view and modify their own settings. Be careful when assigning a manager a user level of 9. Here are some other functions that only level 9 users can perform: Use all of the Admin Utilities features, View the Admin Change Log, Download DNC lists, Download Filter Phone Group lists, Clear leads out of dialer lists.

**User Group** - This menu is where you select the Dialer user group that this user will belong to. The user group setting allows you to divide users into different groups that can be restricted to a set of campaigns in the Dialer system, as well as define whether the agent must log into the timeclock before being allowed to log into Dialer as an agent as well as Shift restrictions and defining whether the Agent's View is enabled and who can be viewed. This also allows for some reports to be displayed with only the results from a specific group in them.

**Phone Login** - Here is where you can set a default phone login value for when the user logs into the agent interface. This value will populate the phone\_login automatically when the user logs in with their user-pass-campaign in the agent login screen. If you have agents that are always at the same phone you can use this option, otherwise leave it blank.

**NOTE:** The "user\_login\_first" agc/option.php setting must be enabled on the back-end of the web server first, for this feature to work.

**Phone Pass** - Here is where you can set a default phone password value for when the user logs into Dialer .php. This value will populate the phone\_pass automatically when the user logs in with their user-pass-campaign in the Dialer .php login screen. If you have agents that are always at the same phone you can use this option, otherwise leave it blank.

**Active** - This field defines whether the user is active in the system and can use Dialer resources. Default is Active. If the user is set to not active then they will not be shown in the initial display of the

users when you go to the user list.

**Voicemail ID** - This is the voicemail box that calls will be directed to in an AGENTDIRECT in-group at the drop time if the in-group has the drop method set to VOICEMAIL and the Voicemail field set to “AGENTVMAIL”.

**User Code and Main Territory** - These are optional fields that have been used for custom applications.

**User Location** - This menu allows you to choose the location for this user. This location can be used by some reports in the system. The options for this menu are defined in the USER\_LOCATIONS\_SYSTEM Settings Container in the Admin - Settings Containers web admin page. The format for this container is -location|description- without the dashes. Locations and their Descriptions must each be less than 100 characters in length. default is -blank-.

**VERM Secondary User Group** - Optional secondary User Group designation only used by the VERM reporting module. Setting this to a User Group will not affect admin or agent operations or permissions in any way, it is only for specific reporting functions within specific reports. Default is -blank- for undefined.

**Email** - This field can be used by some scripts and functions, like dispo\_send\_email.php and two-factor-authentication, referenced by the --A--agent\_email--B-- variable.

**Mobile Number** - This field can be used by two-factor-authentication, if your system is configured for it.

**User Nickname** – This is an optional alternative name that the agent can use when chatting with customers through the customer website chat feature. It is only used if it is populated.

**User Territories** – You will only see this if user territories are enabled on your system. See USER TERRITORIES description at the end of this section for more details.

**User New Lead Limits** – You will only see this if User New Lead Limits are enabled on your system. This feature will only work properly if the campaign is set to either the MANUAL or INBOUND\_MAN Dial Method and No Hopper dialing is enabled. The link will take you to a separate admin page where you can enter in NEW status lead limits for this user on a per-list basis. There is also an Overall Limit setting on this user modify page. This Overall Limit setting will limit the number of new leads this user can dial across all lists per day. Default is -1 for disabled.

**Agent Choose In-groups** - This agent interface option, if set to 1, allows the user to choose the in-groups that they will receive calls from when they login to a CLOSER or INBOUND type campaign. Otherwise the Manager will need to set this in their user detail screen of the admin page. Default is 1-active.

**Agent Choose Blended** - This option if set to 1 allows the user to choose if the agent has their campaign set to blended or not, and if not then the default blended setting will be used. Default is 1 for enabled.

**Agent Choose Territories** - This option if set to 1 allows the user to choose the territories that they will receive calls from when they login to a MANUAL or INBOUND\_MAN campaign. Otherwise the user will be allowed to use all of the territories assigned to them in the User Territories administrative section. This is a custom feature that will not work on most stock Dialer installations.

**HotKeys Active** - This agent interface option, if set to 1, allows the user to use the HotKeys quick-dispositioning function in Dialer .php. Default is 0-not active.

**Scheduled Callbacks** - This agent interface option allows an agent to disposition a call as CALLBK and choose the date and time at which the lead will be re-activated. Default is 1-active.

**Agent-Only Callbacks** - This agent interface option allows an agent to set a callback so that they are the only Agent that can call that customer back. This also allows the agent to see their callback listings and call them back any time they are logged into the campaign where the callback was set. Default is 0-not active. Agent-only CallBack records can be overridden by a Manager after they have been set.

**Next-Dial My Callbacks Override** - This option, if not set to NOT\_ACTIVE, will override the campaign option set for Next-Dial My Callbacks. Default is NOT\_ACTIVE.

**Agent Call Manual** - This allows the agent to be able to manually dial a phone number while in “Pause” Status. If the Phone number exists in the Dialer records, it will retrieve the customer's information as it places the call. If the phone number is not in the records, Dialer will create a brand new lead for that. This option also allows the calling of any phone number from their agent screen and puts that call into their session. Use this option with caution. Setting this option to 2 will allow manual dialing but disable the FAST DIAL function on the agent screen.

**Manual Dial Filter Override** – If this option is set to anything but DISABLED, it will override the Campaign setting Manual Dial Filter. Default is DISABLED.

**Agent Call Email/Chat** – These are currently non-functional settings.

**Agent Recording** - This agent interface option can allow an agent to record their calls or prevent an agent from doing any recordings when they log in to Dialer . This option must be on for Dialer to follow the campaign recording option set in the campaign modification screen. Default is 1-active.

**Agent Transfers** - This agent interface option can allow an agent to three-way-call and/or transfer calls or prevent an agent from opening the transfer - conference section of Dialer at all. If this is disabled, the agent cannot third party call or blind transfer any calls. Default is 1-active.

**Closer Default Blended** - This user interface option simply defaults the Blended check box to be checked on a CLOSER-type campaign login screen. Default is 0-not active.

**User Choose Language** – If languages are enabled on your system, this option allows a user to select the language they want for the agent or administrative interface to display in. Default is 0 for disabled.

**Selected Language** -This is the language that the agent and administrative interface will default to when the agent logs in. Default is -default English-.

**Agent Recording Override** - This option will override the current campaign option for recording. DISABLED will not override the campaign recording setting. NEVER will disable recording on the client. ONDEMAND is the default and allows the agent to start and stop recording as needed. ALLCALLS will start recording on the client whenever a call is sent to an agent. ALLFORCE will start recording on the client whenever a call is sent to an agent giving the agent no option to stop recording. For ALLCALLS and ALLFORCE there is a campaign option to use the Recording Delay to cut down on very short recordings and reduce system load.

**Mute Recordings Override** - This setting will override the campaign setting for -Mute Recording Button- for this user only. Default is DISABLED, which will follow the campaign settings.

**Agent Alter Customer Data Override** - This option will override the current campaign settings for altering of customer data. NOT\_ACTIVE will use whatever setting is present for the campaign. ALLOW\_ALTER will always allow for the agent to alter the customer data, no matter what the campaign setting is. Default is NOT\_ACTIVE.

**Agent Alter Customer Phone Override** - This option will override the current campaign settings for altering of only the customer phone number. NOT\_ACTIVE will use current settings for the campaign. ALLOW\_ALTER will always allow for the agent to alter the customer data, no matter what the campaign setting is. Default is NOT\_ACTIVE.

**Agent Shift Enforcement Override** - This setting will override whatever the users user group has set for Shift Enforcement. DISABLED will use the user group setting. OFF will not enforce shifts at all. START will only enforce the login time but will not affect an agent that is running over their shift time if they are already logged in. ALL will enforce shift start time and will log an agent out after they run over the end of their shift time. Default is DISABLED.

**Agent Call Log View Override** -This setting will override whatever the users user group has set for Agent Call Log View. DISABLED will use the user group setting. N will not allow showing the users call log. Y will allow showing the user call log. Default is DISABLED.

**Campaign Hide Call Log Override** - Setting this option to anything other than DISABLED will override the campaign setting to hide any call log or call count information when lead information is displayed on the agent screen. Using one of the SHOW options will show the last X number of calls to a lead in the call log section of the lead info view. Default is DISABLED.

**Agent Lead Search Override** - This will override whatever is set for the “Agent Lead Search” option on this User's current campaign. NOT\_ACTIVE will use the campaign setting. ENABLED will allow lead searching and DISABLED will not allow lead searching. LIVE\_CALL\_INBOUND will allow search for a lead while on an inbound call only. LIVE\_CALL\_INBOUND\_AND\_MANUAL will allow search for a lead while on an inbound call or while paused. When Lead Search is used on a live inbound call, The lead that initiated the call will be changed to a status of LSMERG, and the logs for the call will be modified to link to the agent selected lead instead. Default is NOT\_ACTIVE.

**Lead Filter** - This option allows you to set a Lead Filter for an individual user. To use this option, the user must be logged in to a campaign that has No Hopper Dialing enabled. Default is EMPTY for disabled.



**User Hide in RealTime** – If enabled on your system, This setting allows you to hide this user from the Real-Time Report display. Default is 0 for disabled.

**Alert Enabled** - This field shows whether the agent has web browser alerts enabled for when calls come into their Dialer .php session. Default is 0 for NO. For more information on Agent Alerts, please refer to the Dialer Agent Manual. Only the Agent can activate and deactivate this feature when they are logged into their Dialer Agent Screen when “Allow Alerts” is active for them.

**Allow Alerts** - This field gives you the ability to allow agent browser alerts to be enabled by the agent for when calls come into their agent interface. Default is 0 for NO. We do not recommend activating this feature.

**Preset Contact Search** - If the user is logged into a campaign with this feature set to CONTACTS, it will disable contact searching for only this user. Default is NOT\_ACTIVE, which uses the current campaign setting.

**Max Inbound Calls** -If this setting is set to a number greater than 0, then it will be the maximum number of inbound calls that an agent can handle across all inbound groups in one day. If the agent reaches their maximum number of inbound calls, then they will not be able to select inbound groups to take calls from until the next day. This setting will override the Campaign setting of the same name. Default is 0 for disabled.

**Max Inbound Calls Filtering Enabled** - If this option is enabled, then the Max Inbound Calls Filtering Options below will be used to determine if an inbound call will be counted as a part of a users inbound call count for the day.

**Filter Statuses** - If Max Inbound Calls Filtering is enabled, the calls dispositioned with the statuses selected in this multi-select box will be excluded from the inbound call count for this user for the day, as well as the -filtered- Next Agent Call routing options.

**Filter In-Groups** - If Max Inbound Calls Filtering is enabled, the calls coming from the inbound groups selected in this multi-select box will be excluded from the inbound call count for this user for the day, as well as the -filtered- Next Agent Call routing options.

**Filter Minimum Seconds** - If Max Inbound Calls Filtering is enabled, the calls that have a customer talk time less than the number of seconds entered in this field will be excluded from the inbound call count for this user for the day, as well as the -filtered- Next Agent Call routing options.

**Max Manual Dial Hopper Calls** - If this setting is set to a number greater than 0, then it will be the maximum number of outbound manual dial hopper calls that an agent can place across all campaigns in one day. A hopper call is a call that is placed by the agent clicking on the DIAL NEXT NUMBER button on their agent screen. If the agent reaches their maximum number of hopper calls and they click to place another DIAL NEXT NUMBER call, then their agent screen will say there are no more leads for them to dial. Default is 0 for disabled.

**Max Manual Dial Hopper Calls Per Hour** - If this setting is set to a number greater than 0, then it will be the maximum number of outbound manual dial hopper calls that an agent can place across all campaigns in one hour. A hopper call is a call that is placed by the agent clicking on the DIAL NEXT NUMBER button on their agent screen. If the agent reaches their maximum number of hopper calls for

the current hour and they click to place another DIAL NEXT NUMBER call, then their agent screen will say there are no more leads for them to dial. The per hour hopper totals are reset at the top of every hour. Default is 0 for disabled.

**Wrap Seconds Override** -If this setting is set to a number 0 or greater, then it will override the Campaign setting for Wrapup Seconds. This is a setting that is only refreshed in the agent interface at agent login time. Default is -1 for disabled.

**Agent Ready Max Logout Override** - If this setting is set to a number 0 or greater, then it will override the Campaign setting for Agent Ready Max Logout Seconds. This is a setting that is only refreshed in the agent interface at agent login time. Default is -1 for disabled.

**Additional Status Group** - This optional setting will allow you to define a Status Group of call disposition statuses that will be available to this agent to status calls with. This will be in addition to the statuses that the agent will already have as a part of the system statuses, campaign statuses as well as list and in-group status groups. The default is blank for disabled.

**Campaign Ranks** - In this section you can define the rank an agent will have for each campaign. These ranks can be used to allow for preferred call routing when Next Agent Call is set to campaign\_rank. In this case, the available agent with the highest rank will always get the next call. Also in this section are the WEB VARs for each campaign. These allow each agent to have a different variable string that can be added to the WEB FORM or SCRIPT tab URLs by simply putting --A--web\_vars--B-- as you would put any other field.

**Campaign Grades** - The Agent Grade sets the probability (from 1 to 10) the waiting agents will receive a call. This only comes into to play when there is more than 1 agent available. If only 1 agent is "ready" they would receive the incoming call regardless of the grade set. If more than one agent is available and the Next Agent Call is set to the grade option, then a random number probability calculation will be made, and one of the agents will be chosen to receive the next call. If one agent has a grade of 1 and the other agent has a grade of 10, then the second agent will have a ten times higher probability of receiving the next call, but it is still possible that the first agent could receive that call.

**Inbound Groups** - This is a user interface option where a manager can select, with a check in the checkbox, the inbound groups they want that user to receive calls from if they have logged into the CLOSER campaign. These groups will show the last set of in-groups selected by the agent. You should only alter these when an agent is logged out because they are populated while an agent is logged in and any changes you have made while an agent is already logged in will not stay in the system. Also in this section is the ability to give the agent a Grade (just like Campaign Grades above) or Rank for each inbound group. These ranks can be used for preferred call routing when that option is selected in the in-group screen. Also in this section are the WEB VARs for each campaign. These allow each agent to have a different variable string that can be added to the WEB FORM or SCRIPT tab URLs by simply putting --A--web\_vars--B-- as you would put any other field.

**Custom User Fields** - These five fields can be used for various purposes, and they can be populated in the Dialer Agent screen web form addresses and scripts as "user\_custom\_one" and so on.

**QC Enabled** - allows the user to log in to the Quality Control agent screen.

**QC User Level** - <NOT AN ACTIVE FEATURE>This defines the agent's Quality Control user level, and dictates the level of functionality for the agent in the QC section:

- 1 - Modify Nothing
- 2 - Modify only Status
- 3 - Modify All Fields
- 4 - Verify First Round of QC
- 5 - View QC Statistics
- 6 - Ability to Modify FINISHED records
- 7 - Manager Level

**QC Pass** - <NOT AN ACTIVE FEATURE>allows the agent to indicate that a record has passed the first round of QC after reviewing the record.

**QC Finish** - <NOT AN ACTIVE FEATURE>allows the agent to specify that a record has finished the second round of QC after reviewing the passed record.

**QC Commit** - <NOT AN ACTIVE FEATURE>allows the agent to specify that a record has been committed in QC. At that point, it can no longer be modified by anyone.

**Realtime Block User Info** - This setting if set to 1 will block user and station information from being displayed in the Real-time report. Default is 0 for disabled

**Admin Hide Lead Data** - This setting only applies to level 7, 8 and 9 users. If enabled it replaces the customer lead data in the many reports and screens in the system with Xs. Default is 0 for disabled.

**Admin Hide Phone Data** - This setting only applies to level 7, 8 and 9 users. If enabled it replaces the customer phone numbers in the many reports and screens in the system with Xs. The DIGITS settings will show only the last X digits of the phone number. Default is 0 for disabled.

**Search Lead Ignore Group Restrictions** - Changing this setting to 1 will allow this user to search for leads throughout the entire system instead of just within the allowed campaigns that are set within their User Group. This will also allow modifying of those leads in the administrative lead modification page. Default is 0 for disabled. To be able to modify this setting, you must belong to a user group that has ALL CAMPAIGNS selected in the Allowed Campaigns section.

**View Reports** - This option allows the user to view the Dialer reports. The user must also be a User Level of 7 or higher to view reports.

**Access Recordings** – If recording access restrictions and logging is enabled on your system, this option allows the user to have access to call recordings.

**Alter Agent Interface Options** - This admin interface option, if set to 1, allows the manager-level user to modify another user's Agent interface options in admin interface. Default is 0-not active.

**Modify Users** - This admin interface option, if set to 1, allows the user to modify users' settings. Default is 0-not active.

**Change Agent Campaign** - This admin interface option, if set to 1, allows the user to alter the user

settings on the campaign that an agent is logged into while they are logged into it. For instance, the real-time report has a feature allowing a manager to change the selected Inbound Groups of an agent, this field must be enabled for the manager to be able to make those changes. Default is 0-not active.

**Delete Users** - This admin interface option, if set to 1, allows the user to delete other users of equal or lesser user level from the system. Default is 0-not active.

**Modify User Groups** - This admin interface option, if set to 1, allows the user to modify user groups' settings in the system. Default is 0-not active.

**Delete User Groups** - This admin interface option, if set to 1, allows the user to delete user groups from the system. Default is 0-not active.

**Modify Lists** - This admin interface option, if set to 1, allows the user to modify Dialer lists' settings, including resetting lists in the system. Default is 0-not active.

**Delete Lists** - This admin interface option, if set to 1, allows the user to delete Dialer lists from the system. Default is 0-not active.

**Load Leads** - This admin interface option, if set to 1, allows the user to load Dialer leads into the Dialer \_list table by using the web based lead loaders. Default is 0-not active.

**Modify Leads** - This option if set to 1 or 3 allows the user to modify leads in the admin section lead search results page. If this option is set to 2 or 4, the admin user can modify all lead fields except for the phone number and alt number fields. This option if set to 3 or 4 allows the user to modify the log statuses of the logs shown in the modify lead admin screen. This option set to 5 is Read-Only mode and will not allow lead modifications or the adding of new leads by the user.

**GDPR-Compliant Export Delete Leads** - This setting if enabled will allow for the complete download and/or deletion of all customer data for a particular lead, in compliance with the General Data Protection Regulation (GDPR). Default is 0 for disabled. A setting of 1 will enable downloading data, and a setting of 2 will enable not just downloading, but also deletion of data, including any recordings.

*You are not allowed to set this user setting higher than the current system setting.*

**Download Lists** - This admin interface option, if set to 1, allows the user to download a file containing all lead data in a specific list by clicking on a link at the bottom of the List Modification page.

**Export Reports** - This setting if set to 1 will allow a manager to access the export call reports on the REPORTS screen. Default is 0. For the Export Calls Report, the following field order is used for exports:

call\_date, phone\_number, status, user, full\_name, campaign\_id/in-group, vendor\_lead\_code, source\_id, list\_id, gmt\_offset\_now, phone\_code, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, length\_in\_sec, user\_group, alt\_dial/queue\_seconds, rank, owner

**Delete From DNC Lists** - This setting if set to 1 will allow a manager to remove phone numbers from

the DNC lists in the Dialer system.

**Custom Fields Modify** - This option if set to 1 allows the user to modify custom list fields.

**Modify Campaigns** - This admin interface option, if set to 1, allows the user to modify Dialer campaigns' settings in the system. Default is 0-not active.

**Campaign Detail** - This admin interface option, if set to 1, allows the user to view and modify the campaign detail screen elements. If this is disabled, the user will only be able to see and modify the Basic elements of a campaign. Default is 0-not active.

**Delete Campaigns** - This admin interface option, if set to 1, allows the user to delete Dialer campaigns from the system. Default is 0-not active.

**Modify In-Groups** - This admin interface option, if set to 1, allows the user to modify Dialer In- Groups' settings in the system. Default is 0-not active.

**Delete In-Groups** - This admin interface option, if set to 1, allows the user to delete Dialer In- Groups from the system. Default is 0-not active.

**Modify DIDs** - This option if set to 1 allows the user to make changes to the DID entries in the Inbound section. Default is 0 – not active

**Delete DIDs** - This option if set to 1 allows the user to remove DID entries in the Inbound section the system. Default is 0 – not active

**Modify Custom Dialplans** -If enabled on your system, this option if set to 1 allows the user to view and modify custom dialplan entries that are available in the Call Menu, System Settings and Servers modification screens.

**Modify Remote Agents** - This admin interface option, if set to 1, allows the user to modify Dialer remote agents' settings in the system. Default is 0-not active.

**Delete Remote Agents** - This admin interface option, if set to 1, allows the user to delete Dialer remote agents from the system. Default is 0-not active.

**Modify Scripts** - This admin interface option, if set to 1, allows the user to Modify Campaign scripts in the script modification screen. Default is 0-not active.

**Delete Scripts** - This admin interface option, if set to 1, allows the user to delete Campaign scripts in the script modification screen. Default is 0-not active.

**Modify Filters** - This admin interface option allows the user to be able to modify Dialer lead filters' settings in the system. Default is 0-not active.

**Delete Filters** - This admin interface option allows the user to be able to delete Dialer lead filters from the system. Default is 0-not active.

**AGC Admin Access** - This option if set to 1 allows the user to login to the astGUIclient admin pages. This setting is special in that it allows for admin access to multiple admin sections by itself - dialer conferences, conferences, group aliases, phones, phone aliases, conf templates, carriers, text-to-speech, music-on-hold, voicemail boxes, screen labels, screen colors, contacts, settings containers, status groups and CID groups.

**Modify Phones** - This setting will allow access for the user to modify the following sections - phones, phone aliases and group aliases.

**Modify Servers** - This setting will allow access for the user to modify the following sections - servers, settings containers, system settings, system statuses, status categories and QC status codes.

**Modify Statuses** - This setting will allow access for the user to modify the following sections - system statuses, status groups, status categories, CID groups and VM message groups.

**AGC Delete Phones** - This admin interface option, if set to 1, allows the user to delete phone entries in the astGUIclient admin pages. Default is 0-not active.

**Modify Call Times** - This admin interface option allows the user to view and modify the call times and state call times records. A user doesn't need this option enabled if they only need to change the call times option on the campaigns screen. Default is 0-not active.

**Delete Call Times** - This admin interface option allows the user to be able to delete Dialer call times records and Dialer state call times records from the system. Default is 0-not active.

**Modify Shifts** - This option allows the user to view and modify the shifts settings in the Admin section. Default is 0 - not active.

**Modify Phones** - This option allows the user to view and modify the Phones settings in the Admin section. Default is 0 - not active.

**Modify Carriers** - This option allows the user to view and modify the Carrier settings in the Admin section. Default is 0 - not active.

**Modify Email Accounts** - This option will allow the user to modify email accounts in the email account management page. Default is 0 - not active.

**Modify Labels** - This options allows users to re-name the Screen Labels used for Dialer default lead tables. Labels are modified in "System Settings" in the Admin section, as well as within the Screen Labels section in Admin. Default is 0 - not active.

**Modify Colors** – This option allows this user to modify the Screen Colors in the Admin section. Default is 0 for disabled.

**Modify Languages** – This option allows this user to modify the Languages in the Admin section. Default is 0 for disabled.

**Modify Statuses** - This options allows users to make changes to the Lead Statuses in "System

Statuses" in the Admin section. Default is 0 - not active.

**Modify Voicemail** - This option allows the user to view and make changes to the Voicemail settings in the Admin section. Default is 0 - not active.

**Modify Audio Store** - This option allows the user to view and make changes to the Audio Store settings in the Admin section. Default is 0 - not active.

**Modify Music On Hold** - This option allows the user to view and make changes to the Music on Hold settings in the Admin section. Default is 0 - not active.

**Modify TTS** - This option allows the user to view and make changes to the "Text to Speech" settings in the Admin section. Default is 0 - not active.

**Modify Contacts** - This option allows the user to view and make changes to the "Contacts" settings in the Admin section. Default is 0 - not active.

**CallCard Access** - This option allows the user to view and make changes to the "CallCard Admin" settings in the Admin section. Default is 0 - not active.

**Add Timeclock Log Record** - This option allows the user to add records to the timeclock log.

**Modify Timeclock Log Record** - This option allows the user to modify records in the timeclock log.

**Delete Timeclock Log Record** - This option allows the user to delete records in the timeclock log.

**Manager Shift Enforcement Override** - This setting if set to 1 will allow a manager to enter their user and password on an agent screen to override the shift restrictions on an agent session if the agent is trying to log in outside of their shift. Default is 0.

**Manager Pause Code Approval** - If a campaign pause code is set to require manager approval, the manager that approves the agent pause code selection must have this setting set to 1. Default is 0.

**Modify IP Lists** - If IP Lists are enabled on your system, this setting will allow this administrative user the ability to modify the IP Lists. Default is 0.

**Ignore IP Lists** - If IP Lists are enabled on your system, this setting will allow this user to ignore the IP Lists settings when accessing the system. Default is 0.

**Two Factor Auth Override** - If Two-Factor-Authorization is enabled on your system, this setting can override it. Default is NOT\_ACTIVE which will not override the System Settings for 2FA.

**Agent API Access** - This option allows the user's account to be used with the Dialer agent API commands. For the agent API to work, you must use an API user(that is different from the user whose session you are sending commands for), that is user account that needs to have API Access activated, not the user who the commands are being sent for.

**API List Restrict** - If enabled, the API commands that involve leads and lists will be restricted to the

lists within the allowed campaigns for the user group of this user. Default is 0 for disabled.

**API Allowed Functions** -This option will allow you to restrict the API functions that are allowed to be used by this user. Default is ALL\_FUNCTIONS.

**API Only User** -This option if enabled will prevent a user from being able to log in to the admin web screen and the agent screen. Default is 0 for disabled.

**Modify Same User Level** - This setting only applies to level 9 users. If enabled it allows the level 9 user to modify their own settings as well as other level 9 users. Default is 1 for enabled.

**Download Invalid Files** – This setting only applies to level 9 users. If enabled it allows the level 9 user to download BAD FORMAT audio files from the Audio Store. Default is 0 for disabled.

**Alter Admin Interface Options** – This option allows you to restrict a level 9 user to prevent them from altering the Admin Interface options of themselves and other level 9 users.

**User Admin Redirect URL** - This option will allow you to define a web address that this user is to be sent to when they log in to the admin web screen. This is usually used for level 7 report only users to send them to one specific report when they log in without seeing the admin web screen at all. Default is blank.

## Delete A User

If the option is enabled, a manager can go to the bottom of a user modification record and click on the "DELETE THIS USER" link to remove a user from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS USER" link to remove the user from the system.

## Copy A User

This page will allow you to copy all of an existing user's settings into a new user account. You just need to enter a new user ID, password, full name and a source user to take the other settings from.

## Search For Users

You can search for a user by clicking on the "SEARCH FOR A USER" link at the top of the USERS section. This screen simply allows you to search for a user based upon whatever elements you select to try to find them with: a name or partial name, user ID, user level or group.

## More User Information

There are several screens that will show you user stats and current status available at the bottom of the user modification screen or the user list screen.



## User Time Sheet

This report will show you the login, logout and call summary time details for a single user for a single day. This report may take some time to load if your system has many agents or has a large call history to search through.

## User Status

This report will only show you information if the user is actively logged in to the agent interface. From this screen you can emergency log the agent out or log them in or out of the Dialer Timeclock. This screen allows you to see the dialer the agent is logged into, their session, Phone extension, current campaign, and ingroups.

NOTE: Added new `AST_phone_update.pl --agent-lookup` flag to allow for logging of the IP address of the agent's SIP or IAX phone connection. It can be enabled as a crontab entry to perform the lookups on each asterisk server.

## User Stats

This page is a collection of the following reports:

- AGENT TALK TIME AND STATUS
- AGENT LOGIN/LOGOUT TIME
- TIMECLOCK LOGIN/LOGOUT TIME
- CLOSER IN-GROUP SELECTION LOGS
- OUTBOUND CALLS FOR THIS TIME PERIOD
- OUTBOUND EMAILS FOR THIS TIME PERIOD
- INBOUND/CLOSER CALLS FOR THIS TIME PERIOD
- AGENT ACTIVITY FOR THIS TIME PERIOD
- RECORDINGS FOR THIS TIME PERIOD
- MANUAL OUTBOUND CALLS FOR THIS TIME PERIOD
- LEAD SEARCHES FOR THIS TIME PERIOD
- PREVIEW LEAD SKIPS FOR THIS TIME PERIOD.

They can be queried for one or a string of days.

## User Multiple-Day Status Report

This report will show the status dispositions that the agent has made per day over the course of multiple days. The report is sortable by several fields including the percentage of DNC dispositions out of total Human Connect calls.

## User Territories

User Territories, if enabled in System Settings, can be used in conjunction with the Campaign settings No Hopper Dialing, Owner Only Dialing<TERRITORY>, the manual dial method, and Agent Select Territories to allow multiple agents to log into a single campaign and dial on a subset of leads within the same list Ids that are defined in the "owner" field of the list to belong to a territory that the user has set in their selected user territories.

## **Overall New Lead Limits**

This screen allows you to set all per-user New Lead Limits on one screen.

## **User Callbacks**

This report will show all of the active and live callbacks that an agent has set as well as some callback details including whether the callback is set as `USERONLY` or `ANYONE`. There is a link on this report for each callback record that allows a manager to alter any of the callback record settings if necessary. An option can be added by your system administrator to the back-end `AST_DB_dead_cb_purge.pl` script to remove duplicate callback entries for a single lead, keeping the newest one only (contact your administrator to set this up).

## **Admin Changes for this User Record**

This section will show you all administrative changes that have been made to this user record, who made the change (and from what IP address), what changed and when it changed.

CAMPAIGN LISTINGS: [show only active campaigns](#)

CAMPAIGN ID	NAME	ACTIVE	GROUP	DIAL METHOD	LEVEL	LEAD ORDER	DIAL STATUSES	MODIFY
<a href="#">ALTTEST</a>	Alt dialing test	Y	---ALL---	MANUAL	0	DOWN	NEW -	<a href="#">MODIFY</a>
<a href="#">INACTIVE</a>	Test inactive campaign	N	---ALL---	MANUAL	0	DOWN	NEW -	<a href="#">MODIFY</a>
<a href="#">MIKETEST</a>	Bug verification	Y	---ALL---	RATIO	4	DOWN	N NEW -	<a href="#">MODIFY</a>
<a href="#">SVYTEST</a>	survey test campaign	Y	---ALL---	RATIO	1	DOWN	NEW -	<a href="#">MODIFY</a>
<a href="#">TEST3</a>	testing 3	N	---ALL---	RATIO	4	DOWN	PDROP DROP B NEW -	<a href="#">MODIFY</a>
<a href="#">TESTCAMP</a>	Test Campaign	Y	---ALL---	INBOUND_MAN	1.0	DOWN	PDROP DROP B NEW -	<a href="#">MODIFY</a>

**Figure 4. Campaigns List**

## Dialer CAMPAIGNS

When you click on the CAMPAIGNS link on the left menu on the admin screen, you will enter the Campaigns section. This starts with a full listing of every Dialer campaign in the system with its campaign ID, name, active state, administrative User Group, dial method & level, lead order, dial statuses and links to modification pages. If you click on the row of the campaign you want to go to, it will take you to the Basic Modify page. If you click on the MODIFY link for the campaign you want to go to, it will take you directly to the Detail Modify page.

There are also several sub-menus in the Campaigns section that will show links to several campaign-specific options: Statuses, HotKeys, Lead Recycling, Auto-Alt-Dialing, List Mix, Pause Codes, Presets and AC-CID. We will first look at adding a new campaign.

## Add a New Campaign

You can get to the Add Campaign screen by clicking on the "ADD CAMPAIGN" link at the top of the CAMPAIGNS section. As with most Dialer add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new campaign you must make sure that you set the campaign ID and campaign name or the submission will not be accepted. Also, please make sure that the campaign ID you have chosen is only letters or

numbers; it should not have any spaces or punctuation (that includes not using dashes “-”), and you cannot use the same ID for a campaign and an in-group. Once you create a campaign, you will not be able to change that campaign ID unless you delete the campaign and re-create it again with a different campaign ID. You cannot have duplicate campaign IDs in the system, and campaign IDs must be between 2 and 8 characters in length.

## Copy A Campaign

This page will allow you to copy all of an existing campaign's settings into a new campaign. You just need to enter a new Campaign ID, Campaign name and a source campaign to take the other settings from.

## Modify Campaigns

*(screen shot of the Modify Campaign screen available in the Appendix)*

At the top of the Campaign Modification screen you will see the options to go to a Basic View, Detailed View and Real-time Campaign screen. The Basic version will have fewer options than the Detail screen, and you can block a manager's access to the Detail screen through user-level permissions. Real-time will take you to a different screen that will show a real time summary of Campaign statistics including number of agents, what servers they are on and other important campaign statistics for the day. If you cannot get to the "Detail View" section of the campaign modification screen, you need to go to the USER modification screen for your user ID and change the Campaign Detail setting to "1".

**Campaign ID** - This is the short name of the campaign, and can not be edited after initial submission. It cannot contain spaces or other punctuation and must be between 2 and 8 characters in length.

**Campaign Name** - This is the description of the campaign, it must be between 6 and 40 characters in length.

**Campaign Description** - This is a memo field for the campaign, it is optional and can be a maximum of 255 characters in length.

**Campaign Change Date** - This is the last time that the settings for this campaign were modified.

**Campaign Login Date** - This is the last time that an agent was logged into this campaign.

**Campaign Call Date** - This is the last time that a call was handled by an agent logged into this campaign.

**8 Day outbound call count graph** - measuring the total calls for the day for campaigns as well as the maximum number of concurrent calls handled by each at any time during the day. Small graphs added to campaign screens as well as larger graphs with more details on a new report screen. These stats are summary stats that are generated from the logs in real-time on the back end, they are not recalculated every time the screen loads as with most other reports.

**Active** - This is where you set the campaign to Active or Inactive. If Inactive, agents will not be able to

log into it.

**Admin User Group** - This is the administrative user group for this campaign, this allows admin viewing of this campaign as well as the lists assigned to this campaign to be restricted by user group. Default is --ALL-- which allows any admin user with user group campaign permissions to view this campaign.

**Park Music-on-Hold** - This is where you can customize the on-hold music for Dialer . In the Admin section, select the “Music on Hold” link. Create a new Music on Hold (or MOH) entry using recordings loaded into your Audio Store. Finally, use the “moh chooser” link next to the Park Music-on-Hold field to select your creation. You can also leave this field blank.

**Web Form** - This is where you can set the custom web page that will be opened when the user clicks on the WEB FORM button. There may also optionally be a Web Form Two and Web Form Three entries, depending on your system settings. This link can have query string items on the end of it but it is not required (<http://www.abc.com/link.php?test=1>). Most of the fields available to the agent are submitted through the query string to the web page you have defined in this field. The “web form” address can use custom variables just like the Script functionality can. To activate custom variables in the web form you just need to put “VAR” at the front of the URL, for example:

VAR[http://www.website.com/search.php?phone=--A--phone\\_number--B--](http://www.website.com/search.php?phone=--A--phone_number--B--)

If you will be adding an agent WEB VAR to the web form you can do so using --A--web\_var--B--. in the following example the agent variable is used to log the agent into an HTTP-authenticated website without prompting them for a username and password. The WEB VAR used is “[test@pass](#)” and the web form string that you would put in would look something like this:

VAR[http://--A--web\\_var--B--www.website.com/search.php?phone=--A--phone\\_number--B--](http://--A--web_var--B--www.website.com/search.php?phone=--A--phone_number--B--)

The agent web variables can be set per campaign and per in-group in the Modify User section for each user.

NOTE: If you do not include “VAR” at the beginning of your Web Form URL, then all possible variables will be included in the query string when an agent clicks on the WEBFORM button, this includes the agent's username and password.

**Web Form Two & Three**– If your system is configured to have these, there will be campaign options and additional WEBFORM buttons on the agent screen for these.

**Web Form Target** – If you are using multi-framed browser screens, then you might want to use this field to define what frame the web form will appear in when the user clicks on the WEB FORM button.

**Allow Closers** - This is where you can set whether the users of this campaign will have the option to send the call to a local or internal Dialer closer. Setting to Y will make the Allowed Closers section appear at the bottom of the Campaign options screen, upon submit. If set to N, then there will be no options to transfer a call to another agent on the Dialer system.

**Allow Emails** – Allows agents logged into this campaign to receive inbound emails in addition to phone calls. Default is “N”.

**Allow Chats** – Allows agents logged into this campaign to receive inbound customer website chats in addition to phone calls. Default is “N”.

**Allow Inbound and Blended** - Set whether the users of this campaign will have the option to take calls from inbound sources (like Dialer frontends) and calls coming in from an outside line. Setting to Y will make the Allowed In-Groups section appear at the bottom of the Campaign options screen, upon submit. If this option is set to N, then the agents logged into this campaign cannot take inbound calls in any way.

**Dial Statuses** - This is where you set the statuses that you are wanting to dial on within the lists that are active for the campaign. You can select over 50 statuses to dial on for each campaign if you need. If you want to remove one, simply click the REMOVE link next to that status, if you want to add one, select it from the “Add a Dial Status to Call” menu and click on the ADD link.

**List Order** - This menu is where you select how the leads that match the statuses selected above will be put in the lead hopper:

- DOWN: select the first leads loaded into the Dialer \_list table
- UP: select the last leads loaded into the Dialer \_list table
- UP PHONE: select the highest phone number and works its way down
- DOWN PHONE: select the lowest phone number and works its way up
- UP LAST NAME: starts with last names starting with Z and works its way down
- DOWN LAST NAME: starts with last names starting with A and works its way up
- UP COUNT: starts with most called leads and works its way down
- DOWN COUNT: starts with least called leads and works its way up
- DOWN COUNT 2nd NEW: starts with least called leads and works its way up inserting a NEW lead in every other lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 3rd NEW: starts with least called leads and works its way up inserting a NEW lead in every third lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 4th NEW: starts with least called leads and works its way up inserting a NEW lead in every fourth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 5th NEW: starts with least called leads and works its way up inserting a NEW lead in every fifth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 6th NEW: starts with least called leads and works its way up inserting a NEW lead in every sixth lead. Must NOT have NEW selected in the dial statuses
- RANDOM: Randomly grabs lead within the statuses and lists defined
- UP LAST CALL TIME: Sorts by the newest local call time for the leads
- DOWN LAST CALL TIME: Sorts by the oldest local call time for the leads
- UP RANK: Starts with the highest rank and works its way down
- DOWN RANK: Starts with the lowest rank and works its way up
- UP OWNER: Starts with owners beginning with Z and works its way down
- DOWN OWNER: Starts with owners beginning with A and works its way up
- UP TIMEZONE: Starts with Eastern timezones and works West
- DOWN TIMEZONE: Starts with Western timezones and works East

**List Order Randomize** – When enabled, randomizes the order of the leads, after they have been placed in the Dial Hopper. Default is N for disabled.

NOTE, if you have a large number of leads this option may slow down the speed of the hopper loading script.

**List Order Secondary** – This is a secondary lead sort criteria. After the List Order sorts the leads, the

List Order Secondary further refines the process. It takes the results of the 1<sup>st</sup> sort and uses an additional criteria to sub-arrange all leads that were considered “equal”. It can arrange then in either numerical (based on the Lead ID) or chronological (based on Last Call Time) order.

**List Mix** - Overrides the Lead Order and Dial Status fields. Will use the List and status parameters for the selected List Mix entry in the List Mix sub section instead. Default is DISABLED. By Default, List Mix is disabled and will not function until your administrator activates List Mix functionality on the server. For the vast majority of Dialer users, we DO NOT recommend using List Mix.

**Lead Filter** - This is a method of filtering your leads using a fragment of a SQL query. Use this feature with caution, it is easy to stop adding leads to the hopper accidentally with the slightest alteration to the SQL statement. Default is NONE. To see more information on the specific Lead Filter that has been selected just click on the linked "Lead Filter".

**Auto Active List New** - This setting will automatically set an inactive list to active when it contains dialable NEW status leads and the campaign has less than this setting number of NEW status leads to be dialed. The order in which the next list is set to active is determined by the List Auto Active List Rank. This feature will only work if there has been calling on this campaign within the last hour. If no leads have been dialed within the last hour in this campaign, then this feature will not function. Default is DISABLED. This feature will only work if the Call Quota Lead Ranking feature is also enabled.

**Call Quota Lead Ranking** - This setting will allow you to choose a Settings Container which has the settings you want to use for Call Quota Lead Ranking. Default is DISABLED.

**Drop Lockout Time** - This is a number of hours that DROP abandon calls will be prevented from being dialed, to disable set to 0. This setting is very useful in countries like the UK where there are regulations preventing the attempted calling of customers within 72 hours of an Abandon, or DROP. Default is 0.

**UK OFCOM Drop Calculation** -This option allows you to enable the new UK OFCOM Drop calculation formula for individual campaigns. As of December 2015, OFCOM in the UK changed their method for calculating the drop,or abandon, percentage for an outbound dialing campaign. The new formula includes an estimate of the number of drops that were answering machines. They do this by using the agent-answered percentage of answering machines and subtracting that percentage from the number of drops. Then that new drop number is divided by the total agent-answered human-answered calls PLUS the number of drops. This differs in several ways from the way it had been done, as well as the way the drop percentage has been calculated in the USA and Canada. This new UK drop calculation method can be activated as a system setting AND a campaign option. Both must be enabled for the campaign to use the new method. In order for agent-statused answering machines to be calculated properly, we have added an answering machine status flag that is used to gather those statuses. Default is 0 for inactive.

**Call Count Limit** - This enforces a limit on the number of call attempts for the leads dialed in this campaign. A lead may go over this limit slightly if Lead Recycling or Auto-Alt-Dialing is enabled. Default is 0 for no limit. *(There are several different types of Call Count Limits available, for more information on this topic, see the chapter titled “CALL COUNT LIMITS”).*

**Call Count Target** - This field is used to calculate the penetration percentage on the list modification

page and some reports, and has no effect on leads dialed. Default is 3.

**Daily Call Count Limit** - This feature, if enabled, will limit the number of times a lead can be called in a single day. Once a lead has reached this set limit, if the lead is selected to be dialed again, the called-since-last-reset flag on the lead will be changed to -Y- and the call will not be dialed. If you want to raise this daily limit during the day, you might need to reset your lists to be able to dial the leads that hit the previous limit earlier in the day. This feature may conflict with Auto-Alt-Dial features if they are enabled on a campaign. Default is 0 for disabled. *(There are several different types of Call Count Limits available, for more information on this topic, see the chapter titled “CALL COUNT LIMITS”).*

**Daily Call Limit Manual** - If the Daily Call Count Limit is enabled, this setting will determine if manual dial calls will be counted and or restricted in the daily call count limit. The DISABLED option will not count manual dial calls or restrict them as part of the daily call count limits, only auto-dial calls would be counted restricted. If one of the COUNT options is used, then manual dial calls would be included in the daily call counts. If one of the RESTRICT options is used, then manual dial calls would be restricted as part of the daily call count limit. Default is DISABLED.

**24-Hour Called Count Limit Method** - This feature will limit the number of calls that can be placed to a lead or phone number over a consecutive 24 hour time period. This setting will determine if the called count limit is based upon a lead or a phone number. Default is DISABLED.

**24-Hour Called Count Limit** - If the 24-Hour Called Count Limit Method setting is not disabled, this setting determines the number of calls that can be placed within 24 hours. For example, if this option is set to -1- and a call is placed to a lead at 11:01, then the next time that lead could be called is after 11:01 the next day. There is no manual dial override for this feature, it will affect all normal customer calls placed within this campaign. If you use this feature with Lead Recycling enabled and the 24-Hour call limit is reached for a recycled lead, the recycling count for that lead will reset to 0 after the 24-Hour call count limit time expires. Default is 0. *(There are several different types of Call Count Limits available, for more information on this topic, see the chapter titled “CALL COUNT LIMITS”).*

**24-Hour Called Count Limit Scope** - If the 24-Hour Called Count Limit feature is enabled, this setting will determine if the called count limit is counted using system-wide call counts or only the called counts within the lists for this campaign. Default is SYSTEM\_WIDE.

**24-Hour Called Count Limit Override** - If the 24-Hour Called Count Limit feature is enabled, you can create a Settings Container of the CALL\_LIMITS\_OVERRIDE container type that will allow you to override the 24-Hour Called Count Limit for calls to specific states, based upon the area-code of the phone number being dialed. The area-code to state relationship is defined in the internal database which you can access by going to Admin, System Settings, Phone Codes. Default is DISABLED.

Example CALL\_LIMITS\_OVERRIDE Container Entry:

; The allowed methods are: state\_areacode, state\_areacode\_postcode, state\_areacode\_postcode\_state, state\_areacode\_state

method => state\_areacode

; One line per state, with fields separated by commas: the country abbreviation, state abbreviation and the 24-hour call limit for that state

state => USA,FL,3

state => USA,GA,4



\*For more detailed information on how this works, read the CALL\_COUNT\_LIMITS.txt document.

**Hopper Drop-Run Trigger** - This setting, if activated, will ignore all hopper loading criteria for a single hopper run for this campaign and it will only load the DROP status leads from the active lists for the campaign into the hopper at the highest hopper priority, and once this single hopper run has happened, this setting will reset to N for this campaign and the hopper loading will go back to normal for the next minute when it runs. This process will also update any DROPS already in the hopper to the highest hopper priority if they are not already there. If the -All Drops- checkbox is checked, then any status with -DROP- in the status or status name will be selected, including all system statuses and campaign statuses whether they are for outbound or inbound calls. WARNING, when this runs it will not check to see if the lists have been reset, so you may be calling back DROP leads that were recently called. However, if the Drop Lockout Time has been enabled, that setting will be honored. Default is N, unselected, for inactive.

**Minimum Hopper Level** - This is how many leads the system tries to keep in the hopper for this campaign. You should make this slightly greater than the number of leads you go through in one minute. This setting is only used for outbound campaigns. The “Hopper” is a small and fast holding area for the leads that you want to dial in the next few minutes. The system takes all of your system and campaign parameters and attempts to fill up the hopper every minute to keep your campaign supplied with leads to dial from your lists.

**Automatic Hopper Level** - Setting this to Y will allow Dialer to automatically adjust the hopper based off the settings in your campaign. Default is Y. The formula it uses to do this is:

Number of Active Agents \* Auto Dial Level \* ( 60 seconds / Dial Timeout ) \* Auto Hopper Multiplier

**Automatic Hopper Multiplier** - This is a multiplier for the Auto Hopper, ranging from 0.1 to 2.0. Setting this less than 1 will cause the Auto Hopper algorithm to load less leads than it normally would. Setting this greater than 1 will cause the Auto Hopper algorithm to load more leads than it normally would. Default is 1.

**Auto Trim Hopper** – This feature automatically removes leads from the hopper in excess of the Minimum Hopper Level. Default is Y.

**Hopper VLC Dup Check** - Setting this to Y will result in every lead being inserted into the hopper being checked by vendor\_lead\_code to make sure there are no duplicate leads inserted with the same vendor\_lead\_code. This is most useful when Auto-Alt-Dialing with MULTI\_LEAD. Setting this to Y if you do not populate the vendor\_lead\_code field in your leads will result in only 1 lead being inserted into the dialing hopper per minute. Default is N.

**Manual Dial Hopper Check** - Setting this to Y will mean that any manually dialed campaign phone call through the agent screen will first check for a lead in the hopper with the same phone number, and if one exists it will be deleted before the manual dial call is placed. Default is N.

**Force Reset of Hopper** - This allows you to wipe out the hopper contents upon form submission. It should be filled again when the AST\_VDhopper script runs, which by default is every minute.

**Dial Method** - This field is the way to define how dialing is to take place. If MANUAL then the

auto\_dial\_level will be locked at 0 unless Dial Method is changed. If RATIO then the normal dialing a number of lines for Active agents. ADAPT\_HARD\_LIMIT will dial predictively up to the dropped percentage and then not allow aggressive dialing once the drop limit is reached until the percentage goes down again. ADAPT\_TAPERED allows for running over the dropped percentage in the beginning of the shift -as defined by Latest Server Time set for campaign- and gets more strict as the shift goes on, for example, if there are 10 hours or more left in the shift, the TAPERED feature will not affect the adaptive dial level at all, as the number of hours left in the shift drops below 10 hours and gets closer to 0, the dial level will be dropped closer and closer to 1.0 as time goes on. ADAPT\_AVERAGE tries to maintain an average or the dropped percentage not imposing hard limits as aggressively as the other two methods. You cannot change the Auto Dial Level if you are in any of the ADAPT dial methods. Only the Dialer can change the dial level when in predictive dialing mode. INBOUND\_MAN allows the agent to place manual dial calls from a campaign list while being able to take inbound calls between manual dial calls. If Shared Campaign Agents is enabled on your system, you will also see “SHARED” options appear here that you can select if you want this campaign to operate as a shared campaign.

**Auto Dial Level** - Sets how many lines Dialer should use per active agent. Zero 0 means auto dialing is off, and the agents will click to dial each number. Otherwise Dialer will keep dialing lines equal to active agents multiplied by the dial level to arrive at how many lines this campaign on each server should allow. If you are using any of the ADAPT\_ dial methods then you cannot change this field unless you change it to RATIO. To the right of the auto dial level menu you will see the ADAPT OVERRIDE checkbox, which allows you to force a new dial level even if the dial method is in an ADAPT mode. This is useful if there is a dramatic shift in the contact rate of the leads that you are dialing and you want to drastically change the dial\_level manually. To raise or lower the range of options in this pull-down, you need to go to Admin → System Settings and change the Auto Dial Limit option.

**Auto Dial Level Threshold** - This setting is specific to the ADAPT or RATIO Dial Methods, and must be set to something other than DISABLED. The number of agents (set in the pulldown menu) must be above 0. This feature allows you to set a minimum number agents that predictive algorithm will work with. If the number of agents falls below the number indicated, then the dial level will go to 1.0 until either more agents log in, or they go into the selected state. LOGGED-IN\_AGENTS will count all agents logged into the campaign, NON-PAUSED\_AGENTS will only count agents that are waiting or talking, and WAITING\_AGENTS will only count agents that are waiting for a call. Default is DISABLED.

**Available Only Tally** - This field if set to Y will leave out INCALL and QUEUE status agents when calculating the number of calls to dial when not in MANUAL dial mode, so only READY agents will have calls dialed for them. Default is N.

**Available Only Tally Threshold** - This setting only works with an ADAPT or RATIO Dial Method, Available Only Tally must be set to N, this setting must be set to something other than DISABLED and the number of agents setting must be above 0. This feature allows you to set the number of agents below which Available Only Tally will be enabled. If the number of agents falls below the number indicated, then the Available Only Tally setting will go to Y temporarily until more agents log in or go into the selected state. LOGGED-IN\_AGENTS will count all agents logged into the campaign, NON-PAUSED\_AGENTS will only count agents that are waiting or talking, and WAITING\_AGENTS will only count agents that are waiting for a call. Default is DISABLED.

**Drop Percentage Limit** - This field is where you set the limit of the percentage of dropped calls you would like while using an adaptive-predictive dial method, not MANUAL, INBOUND\_MAN or RATIO. The maximum allowable dropped-to-human-answered calls ratio percentage according to the United States FTC regulations is 3%.

**Agent In-Call Tally Seconds Threshold** - This feature allows you to specify the amount of time an agent is in a phone call past which the agent is not counted for dialing additional outbound calls while in an auto-dial mode. This feature only works when Available Only Tally is not active. Default is 0 for disabled.

**Maximum Adapt Dial Level** - This field is where you set the limit to the number of lines you would like dialed per agent while using an adaptive-predictive dial method, not MANUAL or RATIO. This number can be higher than the Auto Dial Level if your hardware will support it. Value must be a positive number greater than one and can have decimal places. Default is 3.0.

**Latest Server Time** - This field is only used by the ADAPT\_TAPERED dial method. You should enter in the hour and minute that you will stop calling on this campaign, 2100 would mean that you will stop dialing this campaign at 9PM server time. This allows the Tapered algorithm to decide how aggressively to dial based on how long until you will be finished calling.

**Adapt Intensity Modifier** - This field is used to adjust the predictive intensity either higher or lower. The higher a positive number you select, the greater the dialer will increase the call pacing(auto dial level) when it goes up and the slower the dialer will decrease the call pacing when it goes down. The lower the negative number you select here, the slower the dialer will increase the call pacing and the faster the dialer will lower the call pacing when it goes down. For example, if the dialer calculates that an optimal dial level would be 2.0 it is currently at 1.0 and the intensity modifier is set to -10, then the dialer would adjust to set the dial level to only 1.9. Default is 0. This field is not used by the MANUAL or RATIO dial methods.

**Dial Level Difference Target** - This field is used to define whether you want to target having a specific number of agents waiting for calls or calls waiting for agents. For example if you would always like to have on average one agent free to take calls immediately you would set this to -1, if you would like to target always having one call on hold waiting for an agent you would set this to 1. If you are having problems keeping your drop level down, it often helps to set this to -1. Default is 0. This field is not used by the MANUAL or RATIO dial methods.

**Dial Level Difference Target Method** - This option allows you to define whether the dial level difference target setting is applied only to the calculation of the dial level or also to the actual dialing on each dialing server. If you are running a small campaign with agents logged in on many servers you may want to use the ADAPT\_CALC\_ONLY option, because the CALLS\_PLACED option may result in fewer calls being placed than desired. This option is only active if Dial Level Difference Target is set to something other than 0. Default is ADAPT\_CALC\_ONLY.

**Concurrent Transfers** - This setting is used to define the number of calls that can be sent to agents at the same time. What this means is that if the concurrent transfer setting is set to 5, then the most recent five customer-connected calls can be sent immediately to agents without waiting for the first connected call to be sent to an agent. This feature does not have much of an effect on efficiency when used in a small setup, but when you get up to 100 agents and higher it can have a dramatic effect, especially

when you can have 20 customers answering calls within the same second. It is recommended that this setting is left at AUTO. This field is not used by the MANUAL dial method.

**Queue Priority** - This setting is used to define the order in which the calls from this outbound campaign should be sent to agents in relation to the inbound calls if this campaign is in blended mode. Default for outbound is 50 and default for inbound-groups is 0, so by default outbound calls will be sent to agents before inbound calls if both are waiting.

**Shared Dial Rank** - For campaigns that are set to a SHARED dial method, this setting will indicate the dialing priority among all of the SHARED dial method campaigns in the system for this specific campaign. The smaller the Shared Dial Rank number for a campaign, the sooner a call will be placed for that campaign. Default is 99.

**Multiple Campaign Drop Rate Group** - This feature allows you to set a campaign as a member of a Campaign Drop Rate Group, or a group of campaigns whose Human Answered calls and Drop calls for all campaigns in the group will be combined into a shared drop percentage, or abandon rate. This allows you to run multiple campaigns at once and more easily control your drop rate. This is particularly useful in the UK where regulations permit this drop rate calculation method with campaign grouping for the same company even if there are several campaigns that company is running during the same day. To enable this for a campaign, just select a group from the list. There are 10 groups defined in the system by default, you can contact your system administrator to add more. Default is DISABLED.

**Inbound Queue No Dial** - This feature if set to ENABLED allows you to prevent outbound auto-dialing of this campaign if there are any inbound calls waiting in queue that are part of the allowed inbound groups set in this campaign. Setting this to ALL\_SERVERS will change the algorithm to calculate all inbound calls as active calls on this server even if they are on another server which will reduce the chance of placing unnecessary outbound calls if you have calls coming in on another server. If the selected option includes CHAT, then no outbound auto-dialing will take place while an inbound customer chat is waiting. Default is DISABLED.

**Inbound No-Agents No-Dial** - If set to something other than ---DISABLED---, the selected INGROUP\_LIST type of Settings Container will be used to determine if any agents are ready and waiting for phone calls from at least one of the listed In-Groups. If there are less inbound agents available than the Threshold setting below, then no outbound calls will be placed for this campaign. Default is DISABLED.

**Inbound No-Agents No-Dial Threshold** - If the Inbound No-Agents No-Dial option is enabled above, then this setting will be used to determine if the campaign will be allowed to place outbound auto-dial calls, if this number is greater than the number of inbound agents available. Default is 0, for disabled.

**Auto Alt-Number Dialing** - This setting is used to automatically dial alternate number fields for a lead while dialing in the RATIO and ADAPT dial methods when there is no contact at the main phone number. To enable auto alt-number dialing you need to set this field to ALT\_ONLY, ADDR3\_ONLY or ALT\_AND\_ADDR3 and set your desired statuses in the Auto alt number dialing statuses section at the bottom of the Campaign Detail screen, usually the NA, B, DC and N statuses are what is used for this. This setting is not used by the MANUAL dial method. EXTENDED alternate numbers are numbers loaded into the system outside of the standard lead information screen. Using EXTENDED,

you can have hundreds of phone numbers for a single customer record. If you want to use the EXTENDED method, you should contact your system administrator to set up lead loading to work with that method.

**Auto Alt-Number Dialing Threshold** - If Auto Alt-Number Dialing is enabled, and not set to MULTI\_LEAD, then this setting will specify the number of call attempts to the lead after which the Auto Alt dialing will no longer place alternate number calls for a specific lead, if the lead is called after this number of attempts then only the main phone number will be called. There is also a List Override option for this feature. Default is 0 for the threshold being disabled.

**Next Agent Call** - This determines which agent receives the next call that is available:

- random: orders by the random update value in the Dialer \_live\_agents table
- oldest\_call\_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
- oldest\_call\_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
- overall\_user\_level: orders by the user\_level of the agent as defined in the Dialer \_users table a higher user\_level will receive more calls.
- campaign\_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
- campaign\_grade\_random: orders based on the agent's User Grade for the campaign. The higher the agent's User Grade, the higher their probability to receive a call.
- fewest\_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- longest\_wait\_time: orders by the amount of time agent has been actively waiting for a call
- overall\_user\_level\_wait\_time: same as overall\_user\_level except will use longest waiting as secondary order.
- campaign\_rank\_wait\_time: same as campaign\_rank except will use longest waiting as secondary order.
- fewest\_calls\_wait\_time: same as fewest\_calls except will use longest waiting as secondary order.

**Local Call Time** - This is where you set during which hours you would like to dial, as determined by the local time for the leads you are calling. This is controlled by area code and is adjusted for Daylight Savings time if applicable. General Guidelines in the USA for Business to Business is 9am to 5pm and Business to Consumer calls is 9am to 9pm. To see more information on the Call Time that has been selected just click on the linked "Local Call Time". For more information on call time restrictions, look in the Regulations for the USA section of this manual. Directly below this line, you will see a count of the total number of State Call Times that are active within the selected call time. To see these State Call Times, click on the Local Call Time link. Any active Holidays defined for this Call Time within the next 12 months will be displayed in the agent screen Scheduled Callbacks calendar panel with an orange colored background.

**Dial Timeout** - If defined, calls that would normally hangup after the timeout defined in your dialplan (extensions.conf) would instead timeout at this amount of seconds if it is less than the dialplan timeout. This allows for quickly changing dial timeouts from server to server and limiting the effects to a single campaign. If you are having a lot of Answering Machine or Voice mail calls you may want to try changing this value to between 19-26 and see if results improve. USA FTC Safe-Harbor regulations require at least 15 seconds of ring time on business to consumer calls( which they consider to be four rings).

**Dial Prefix** - This field allows for more easily changing a path of dialing to go out through a different method without doing a reload in Asterisk. Default is 9 based upon a 91NXXNXXXXXX in the dialplan (extensions.conf). For no dial prefix you should put only an X in this field.

**Manual Dial Prefix** - This optional field allows you to set the dial prefix to be used only when placing manual dial calls from the agent interface, such as using the MANUAL DIAL feature, or Dial Next Number when in the MANUAL dial method, or manual alt number dialing, or scheduled user-only callbacks. Default is empty for disabled, which will use the Dial Prefix defined in the field above. This option does not interfere with the 3way Dial Prefix option.

**Omit Phone Code** - This field allows you to leave out the phone\_code field while dialing within Dialer . For instance if you are dialing in the UK from the UK you would have 44 in as your phone\_code field for all leads, but you just want to dial 10 digits in your dialplan extensions.conf to place calls instead of 44 then 10 digits. Default is N.

**Campaign Caller ID** - This field allows for the sending of a custom callerid number on the outbound calls. This is the number that would show up on the callerid of the person you are calling. The default is UNKNOWN. If you are using T1 or E1s to dial out this option is only available if you are using PRIs - ISDN T1s or E1s - that have the custom callerid feature turned on, this will not work with Robbed-bit service -RBS- circuits. This will also work through most VOIP -SIP or IAX trunks- providers that allow dynamic outbound callerID. The custom callerID only applies to calls placed for the campaign directly, any 3rd party calls or transfers will not send the custom callerID. NOTE: Sometimes putting UNKNOWN or PRIVATE in the field will yield the sending of your default callerID number by your carrier with the calls. You may want to test this and put 0000000000 in the callerid field instead if you do not want to send you CallerID.If all of the CallerID options are enabled, this is the priority in which each type of CallerID will be used, 1 is top priority -

- 1 - List CID Group Override
- 2 - List CallerID Override
- 3 - CID Group entry (CID Group Failover)
- 4 - AC-CID AREACODE entry
- 5 - Custom CallerID, Security Phrase
- 6 - USER\_CUSTOM CallerID
- 7 - Campaign CID

**Custom Caller ID** - When set to Y, this option allows you to use the security\_phrase field in the list table as the CallerID to send out when placing for each specific lead. If this field has no CID in it then the Campaign CallerID defined above will be used instead. This option will disable the list CallerID Override if there is a CID present in the security\_phrase field. Default is N. When set to AREACODE you have the ability to go into the AC-CID submenu and define multiple callerids to be used per areacode. For MANUAL and INBOUND\_MAN dial methods only, and agent manual dial calls in other dial methods, you can use one of the USER\_CUSTOM selections to take a CallerID number put into one of the User Custom fields in the User Modify admin screen and use that for outbound manual dial calls placed by an agent. For more information on CallerID priority, see below. If all of the CallerID options are enabled, this is the priority in which each type of CallerID will be used, 1 is top priority -

- 1 - List CID Group Override
- 2 - List CallerID Override

- 3 - CID Group entry (CID Group Failover)
- 4 - AC-CID AREACODE entry
- 5 - Custom CallerID, Security Phrase
- 6 - USER\_CUSTOM CallerID
- 7 - Campaign CID

**CID Group** - If set to something other than ---DISABLED---, the selected CID Group will override all other campaign CID settings above and will use the state or areacode based CIDs that are defined in the CID Group. Default is ---DISABLED---. For more information on CallerID priority, see the CALLERID PRIORITY entry above this one.

**CID Group Failover** - If set to something other than ---DISABLED---, the selected CID Group will be used if the main CID Group set above does not have a matching areacode or state entry for the phone number being called. Default is ---DISABLED---. For more information on CallerID priority, see the CALLERID PRIORITY entry below.

If all of the CallerID options are enabled, this is the priority in which each type of CallerID will be used, 1 is top priority -

- 1 - List CID Group Override
- 2 - List CallerID Override
- 3 - CID Group entry (CID Group Failover)
- 4 - AC-CID AREACODE entry
- 5 - Custom CallerID, Security Phrase
- 6 - USER\_CUSTOM CallerID
- 7 - Campaign CID

**Campaign CID Name** - If your system is set up to send CallerID Name through an OpenSIPs gateway, you can define it here for all outbound calls placed through this campaign. Default is blank for disabled.

**Dial Timeout Lead Container** - This option allows you to select a Settings Container of the DIAL\_TIMEOUTS type that will allow you to override the campaign dial timeouts on a per lead basis using a lead field value defined in the container. You can enable manual dialing and auto dialing overrides separately by defining which lead field is to be looked at for a dial timeout key value. If you wanted to use the -comments- lead field for manual dial timeouts, you would define manual\_dial\_field => comments. If you wanted to use the -comments- lead field for auto dial timeouts, you would define auto\_dial\_field => comments. after either or both of these are defined, you will need to define the key and value pairs for the dial timeouts. For example, if a key of -A- in the comments field should trigger a 50 second dial timeout override for the lead, you would define A => 50. You can define multiple key and value pairs in the settings container. Lead field names should be in lower case letters only. You must define the Lead Field Name above any Field Values that you define. Field value matching is case sensitive. We recommend not matching to field values that have spaces or special characters in them.

**Routing extension** - This field allows for a custom VDAD transfer extension. This allows you to use different call handling methods depending upon your campaign.

- 8364 – same as 8368
- 8365 – Will send the call only to an agent on the same server as the call is on, DISABLED, now same as 8367
- 8366 – Used for press-1 and survey campaigns

- 8367 – Will try to first send the call to an agent on the local server, then it will look on other servers
- 8368 – DEFAULT – Will send the call to the next available agent no matter what server they are on
- 8369 – Used for Answering Machine Detection after that, same behavior as 8368
- 8373 – Used for Answering Machine Detection after that same behavior as 8366-
- 8374 - Used for press-1, broadcast and survey campaigns with Cepstral Text-to-speech
- 8375 - Used for Answering Machine Detection then press-1, broadcast and survey campaigns with Cepstral Text-to-speech

**Agent Search Method Override** - This setting will allow you to override the dialplan agent search method and force one only for this campaign. LB will search for the next agent on any server to send the answered call to. LO will first search on the originating server then search for agents on other servers. SO will only search on the originating server for an agent to send the answered call to. Default is blank for disabled. WARNING, setting this to -SO- can result in a much higher number of dropped calls.

**Campaign Rec extension** - This field allows for a custom recording extension to be used with Dialer . This allows you to use different extensions depending upon how long you want to allow a maximum recording and what type of codec (audio compression) you want to record in. The default extension is 8309 which if you follow the SCRATCH\_INSTALL examples will record in the WAV format for up to one hour. Another option included in the examples is 8310 which will record in GSM format for up to one hour. By default, recordings only last for one hour, if you want them to last longer you will need to have your System Administrator set the timeout on recordings to a higher number.

**Campaign Recording** - This menu allows you to choose what level of recording is allowed on this campaign. NEVER will disable all recording on the client. ONDEMAND is the default and allows the agent to start and stop recording as needed. ALLCALLS will start recording on the client whenever a call is sent to an agent. ALLFORCE will start recording on the client whenever a call is sent to an agent giving the agent no option to stop recording. For ALLCALLS and ALLFORCE there is an option to use the Recording Delay to cut down on very short recordings and reduce system load.

**Campaign Rec Filename** -This field allows you to customize the name of the recording when Campaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN INGROUP CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID CALLID RECID. If your dialers have --POST recording processing enabled, you can also use POSTVLC POSTSP POSTARRD3 POSTSTATUS. These POST options will alter the recording file name after the call has been finished and will replace the post variable with the value from the default fields. The default is FULLDATE\_AGENT and would look like this 20051020-103108\_6666. Another example is CAMPAIGN\_TINYDATE\_CUSTPHONE which would look like this TESTCAMP\_51020103108\_3125551212.

The resulting filename must be less than 90 characters in length.

**Recording Delay** - For ALLCALLS and ALLFORCE recording only. This setting will delay the starting of the recording on all calls for the number of seconds specified in this field. Default is 0. You may want to use this set at 10 to reduce on the number of recordings of very short calls where there is an Answering Machine or the desired person is not available. Using this can also greatly reduce the load on your server.

**Routing Initiated Recording** -This option, if enabled, allows you to have the call routing script for



Outbound auto-dial calls trigger the agent call recording instead of the agent screen. This option will only work if the recording option is set to ALLCALLS or ALLFORCE. This will work with agent manual dialed calls only if the recording delay is also set to 0. Default is N for disabled.

**Mute Recording Button** - This option, if enabled, will make the MUTE RECORDING button appear on the agent screen below the existing recording button. If a recording is muted, it will record silence or pause the recording until the MUTE RECORDING button is clicked a second time. You should not mute recordings for more than 15 minutes at a time. Default is N for disabled.

**Call Notes Per Call** - Setting this option to ENABLED will allow agents to enter in notes for every call they handle in the agent interface. The notes entry field will appear below the Comments field in the agent interface. Also, if the Agent User Group is allowed to view Call Logs then the agent will be able to view past call notes for a lead at any time. Default is DISABLED

**Comments All Tabs** -Setting this option to ENABLED will display the Comments field on all tabs in the main agent screen. Default is DISABLED.

**Comments Dispo Screen** -Setting this option to ENABLED will display the Comments field at the top of the agent disposition screen. If the REPLACE\_CALL\_NOTES option is selected, then the Comments field will replace the Call Notes field on the disposition screen if Per Call Notes is enabled. Default is DISABLED.

**Comments Callback Screen** -Setting this option to ENABLED will display the Comments field at the top of the callback scheduling screen. If the REPLACE\_CB\_NOTES option is selected, then the Comments field will replace the Callback Notes field on the callback scheduling screen. Default is DISABLED.

**QC Comments History** -Setting this option to AUTO\_OPEN will automatically open the QC comments history panel in the agent interface when a call goes to the agent screen that has QC comments. The MINIMIZE options will allow the QC Comment History panel to collapse to the bottom of the screen when you click to hide it instead of it disappearing completely. Default is CLICK.

**Hide Call Log Info** - Enabling this option will hide any call log or call count information when lead information is displayed on the agent screen. Using one of the SHOW options will show the last X number of calls to a lead in the call log section of the lead info view. Default is N.

**Agent Lead Search** - Setting this option to ENABLED will allow agents to search for leads and view lead information while paused in the agent interface. Also, if the Agent User Group is allowed to view Call Logs then the agent will be able to view past call notes for any lead that they are viewing information on. LIVE\_CALL\_INBOUND allows the agent to search for a lead and have their active lead change to a search result lead that they selected (on inbound calls only). LIVE\_CALL\_INBOUND\_AND\_MANUAL allows searching for a lead while on an inbound call or while paused. When Lead Search is used on a live inbound call, the initial lead will be changed to a status of LSMERG, and the logs for the call will be modified to link to the agent selected lead instead. Default is DISABLED.

**Agent Lead Search Method** - If Agent Lead Search is enabled, this setting defines where the agent will be allowed to search for leads. SYSTEM will search the entire system, CAMPAIGNLISTS will

search inside all of the active lists within the campaign, CAMPLISTS\_ALL will search inside all of the active and inactive lists within the campaign, LIST will search only within the Manual Dial List ID as defined in the campaign. Default is CAMPLISTS\_ALL. One of these options with USER\_ in front will only search within leads that have the owner field matching the user ID of the agent, the options with GROUP\_ in front will only search within leads that have the owner field matching the user group that the user is a member of, the options with TERRITORY\_ in front will only search within leads that have the owner field matching the territories that the agent has selected.

**Script** - This menu allows you to choose the script that will appear on the agents' screens for this campaign. Select NONE to show no script for this campaign. To see more information on the Script that has been selected just click on the linked "Script".

**Clear Script** - This option if enabled will clear the agent SCRIPT tab after a call has been dispositioned by the agent. Default is DISABLED.

**User Group Script Override** - Enabling this setting will allow the User Group setting for a selected Script to override all other script settings for the agent that are set at the Campaign, List or In-Group levels. If no Script is set at the User Group level, then it will be ignored. Default is DISABLED.

**Script Tab Frame Location** - This option will allow you to specify additional changes to how the Script tabs appear on the agent screen. The LEFT\_EDGE option will have the Script tabs go to the left edge of the agent screen, covering the buttons on that side. Default is DEFAULT.

**Clear Form Tab** - If Custom List Fields is enabled, this option can clear the agent FORM tab after a call has been dispositioned by the agent. The ACKNOWLEDGE option will show a message that the form data has been submitted, but will not show any of the data itself. Default is ACKNOWLEDGE.

**Get Call Launch** - This menu allows you to choose whether you want to auto-launch the web-form page in a separate window, auto-switch to the SCRIPT, EMAIL, or CHAT tab, emails and chats must be allowed to have those options available, or do nothing when a call is sent to the agent for this campaign. If custom list fields are enabled on your system, FORM will open the FORM tab upon connection of a call to an agent. If the PREVIEW option is included, then the launch will happen if a lead is being previewed.

**Agent Browser Call Alert Sound** - This is the sound that will be played in the web browser that the agent is logged into the agent screen with when a call arrives into the agent session. Default is --- NONE--- for no sound. This feature must be enabled in System Settings.

**Show Confetti** - Enable this option to add a bit of visual flair to the agent interface by having the screen rain confetti whenever the agent sets a call disposition that has been flagged with a sale or callback category. Options are SALES for sale calls only, CALLBACKS for callbacks only, and SALES\_AND\_CALLBACKS for both categories. By default the confetti will rain for 2 seconds after the call is dispositioned, but the duration of the confetti falling, the amount of confetti, and speed at which the confetti falls can be configured via an optional settings container, CONFETTI\_SETTINGS. Default is DISABLED

**Answering Machine Message** - This field is for entering the prompt to play when the agent gets an answering machine and clicks on the Answering Machine Message button in the transfer conference

frame. You must set this to either an audio file in the audio store or a TTS prompt if TTS is enabled on your system. You can also use lead fields to generate audio filenames using the DYN flag, for instance using DYN--A--user--B-- for agent 1234 would look for a file named 1234.wav in your audio store to play. If you need more space to build your message with files, you can put them into a Settings Container and the use STC and then the container ID to use that settings container as your answering machine message. Another advanced option is LTT, if you have custom programming on your system to construct answering machine messages on a per-call basis. If you will be using the Agent API function vm\_message, you will want to put LTTagent in this field.

**Voicemail Message Daily Limit** - This option allows you to limit the number of times a voicemail message plays to a lead for a single day. After the defined limit is reached, the call will be hung up instead of playing a message. If this feature is active then it will be in effect for all calls sent to play a voicemail message, even if an agent manually sends a call to a VM message. The default is 0, for disabled.

**Wait For Silence Options** – If Wait For Silence is desired on calls that are detected as Answering Machines then this field has those options. There are three settings separated by a comma, the first option is how long to detect silence in milliseconds, the second option is for how many times to detect that before playing the message, the third is the maximum number of seconds to wait before timing out and playing the message. Default is EMPTY for disabled. A standard value for this would be wait for 2 seconds of silence twice: 2000,2,30

**AM Message Wildcards** -This option, if enabled, allows you to go to the AM Message Wildcard administration page(the link appears after you set this field to ‘Y’ and submit) where you can define wildcards that can match data in a default lead field and can play a different message based upon the data in a specific lead. Default is N for disabled.

**AMD Type** - This setting allows you to define the type of Answering Machine Detection that should be used when routing answered outbound calls. The default is AMD, for the built-in AMD application. You should only change this setting if you have one of the listed third-party AMD solutions installed on your system and you have confirmed the proper Routing Extension to use with your system administrator.

**AMD send to Action** - This option allows you to define whether a call is sent to the Answering Machine Message or CPD AMD Action when an answering machine is detected, or if it is hung up. If this is set to N, then the call will be hung up as soon as it is determined to be an answering machine. Default is N.

**AMD Agent Route Options** - If enabled and you are using Asterisk AMD, this setting will allow you to define the AMD statuses and responses for calls going through AMD that will be sent to agents, overriding the default which sends all HUMAN and NOTSURE status calls to agents. To see the AMD statuses and responses for the calls that have been logged on your system, go to the AMD Log Report on the Admin Utilities page. The PENDING option for this setting will allow you to click on this option to go to the Modify Settings Container page to edit the settings without making them active yet. Default is DISABLED. The Settings Container for these options allow for multiple lines of settings, with each line containing one AMD status-response pair each separated by a comma. For example:  
HUMAN,HUMAN  
NOTSURE,TOOLONG

**CPD AMD Action** - If you are using the Sangoma ParaXip Call Progress Detection software then you will want to enable this Feature. Set to either DISPO, which disposes the call as AA and hang up if the call is being processed and has not been sent to an agent yet. MESSAGE sends the call to the defined Answering Machine Message for this campaign. INGROU transfers the call to the Ingroup indicated in AMD Inbound Group. While CALLMENU routes the call to the CPD Call Menu. Default is DISABLED.

**CPD Unknown Action** -If you are using the Sangoma ParaXip Call Progress Detection software and you want to send calls that have an Unknown result to a destination other than an agent, then you will want to enable this setting either setting it to DISPO which will disposition the call as AA and hang it up if the call is being processed and has not been sent to an agent yet or MESSAGE which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED. Setting this to INGROU will send an answering machine to an inbound group. Setting this to CALLMENU will send an answering machine to a Call Menu in the system.

**AMD Inbound Group** – If CPD AMD Action is set to INGROU, this indicates the groups calls will be routed to.

**AMD Call Menu** – When CPD AMD Action has CALLMENU selected, this specifies which Call Menu will be used.

**VM Message Group** - If this option is set, the VM transfer panel button will open up a new panel with all of the messages that are shown in the selected VM Message Group that the agent can choose to have played to the customer voicemail box when transferred. Default is blank for disabled.

**Leave VM No Dispo** - If this option is enabled, when the agent transfers a call to a VM Message, the agent screen will not automatically be sent to the disposition screen, it will stay in the talk screen. Default is DISABLED.

**Transfer-Conf Numbers and DTMF** - These seven fields allow for you to have two sets of Transfer-Conference Number and DTMF presets and three additional conference numbers. When the call or campaign is loaded, the agent interface will show two links(D1 through D5) on the transfer-conference frame and auto-populate the number-to-dial and the send-dtmf fields when clicked-on. If you want to allow Blind transfers of customers to a Dialer AGI script for logging or an IVR, then place AXFER in the number-to-dial field. You can also specify a custom extension after the AXFER, for instance if you want to do Custom AGI IVR script you would put AXFER82904 in the number-to-dial field(assuming that \_82904. is in your dialplan). Consultative transfers no longer need to use the CXFER prefix now that there is a CONSULTATIVE checkbox option on the Agent screen.

**Enable Transfer Presets** - This transfer option will enable the Presets sub menu to appear at the top of the Campaign Modification page, where you can specify an almost unlimited list of transfer phone numbers. A “Presets” link appears at the bottom right corner of the agent's screen (in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it pops a window showing all their available preset phone numbers. Selecting the entry from the list places it in the “Number to Call” field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact\_information is enabled on your system, that is a custom feature. STAGING will allow you to configure Presets without having them available in the agent screen.

**Hide Transfer Number to Dial** - This option will hide the Number to Dial field in the Transfer-Conference frame of the agent interface. Default is DISABLED.

**PrePopulate Transfer Preset** - This option will fill in the Number to Dial field in the Transfer Conference frame of the agent screen if defined. Default is N for disabled.

**Quick Transfer Button** - This option will add a Quick Transfer button to the agent screen below the Transfer-Conf button that will allow one click blind transferring of calls to the selected In-Group or number. IN\_GROUP will send calls to the Default Xfer Group for this Campaign, or In-Group if there was an inbound call. The PRESET options will send the calls to the preset selected. Default is N for disabled.

**Transfer-Conf Button Launch** - This feature allows you to have a Webform or agent screen tab trigger when the Transfer Conf button on the agent screen is clicked. Default is NONE.

**Transfer No Dispo** - This option will allow an agent to transfer a call to an external number, Local Closer or Leave 3-Way without having the Disposition screen pop up on their screen. Default is DISABLED. WARNING: We do not recommend enabling this option if calls are transferred to other agents, since it can result in data inconsistencies.

**Custom 3-Way Button Transfer** - This option adds a Custom Transfer button to the agent screen below the Transfer-Conf button. It allows one click three way calls using the selected preset or field. The PRESET\_ options will place calls using the defined preset value. The FIELD\_ options will place calls using the number in the selected field from the lead. DISABLED will not show the button on the agent screen. The PARK\_ options will park the customer before dialing. The VIEW\_PRESET option will simply open the transfer frame and the preset frame. The VIEW\_CONTACTS option will open a contacts search window (this only works if Enable Presets is set to CONTACTS). Default setting is DISABLED.

**3-Way Call Outbound CallerID** - This defines what is sent out as the outbound callerID number from 3-way calls placed by the agent, CAMPAIGN uses the custom campaign callerID, CUSTOMER uses the number of the customer that is active on the agents screen and AGENT\_PHONE uses the callerID for the phone that the agent is logged into. AGENT\_CHOOSE allows the agent to choose which callerID to use for 3-way calls from a list of choices. CUSTOM\_CID will use the Custom CID that is defined in the security\_phrase field of the list table for the lead.

**3-Way Call Dial Prefix** - This defines what is used as the dial prefix for 3-way calls, default is empty so the campaign dial prefix is used, passthru so you can hear ringing is 88.

**3-Way Volume Buttons** - This option allows you to enable or disable the volume up, down and mute buttons in the LIVE CALLS IN YOUR SESSION panel when the agent is on a 3-way call. Default is ENABLED.

**Customer 3-Way Hangup Logging** - If this option is ENABLED the user\_call\_log will log when a customer hangup up if they hang up during a 3-way call. Also, this can allow for the Customer 3-way hangup action if one is defined below. Default is ENABLED.

**Customer 3-Way Hangup Seconds** - If Customer 3-way logging is enabled, this option allows you to define the number of seconds after the customer hangup is detected before it is actually logged and the optional customer 3-way hangup action is executed. Default is 5 seconds.

**Customer 3-Way Hangup Action** - If Customer 3-way logging is enabled, this option allows you to have the agent screen automatically hang up on the call and go to the DISPO screen if this option is set to DISPO. Default is NONE.

**3-Way Recording Stop** - If this option is enabled, recording of the session will stop when an agent clicks on the DIAL WITH CUSTOMER or PARK CUSTOMER DIAL transfer buttons. Default is N for disabled.

**3-Way Recording Stop Exception** - If not set to DISABLED, this setting allows you to exempt the 3-Way Recording Stop feature above for a set list of phone numbers, that you define in a PHONE\_NUMBERS type of Settings Container. If 3-Way Recording Stop is set to -N-, then 3-way calls to the number in this list will have recordings stopped when the 3-way call is started. If 3-Way Recording Stop is set to -Y-, then 3-way calls to the number in this list will not have recordings stopped when the 3-way call is started. Default is DISABLED. If you use this feature, it is important that the settings container for it does not have any carriage returns, newlines or blank lines at the bottom of the Container Entry, or this feature may not work properly.

**Leave 3-Way Start Recording** - If this option is enabled, a recording will be started when the agent clicks the LEAVE 3WAY button while in a 3-way call with a customer, and the recording will continue after the agent has left the call. The ALL\_BUT\_EXCEPTIONS option will enable this feature for all 3-way calls except for calls to the phone numbers in the below Exception List of phone numbers. The ONLY\_EXCEPTIONS option will disable this feature for all 3-way calls except for calls to the phone numbers in the below Exception List of phone numbers. Default is DISABLED. WARNING, this may result in these call recordings having several extra minutes of silence at the end of the recordings, after the customer and 3way call have hung up, unless your System Administrator enables the --cu3way and --no-vc-3way-check options on your dialers.

**Leave 3-Way Start Recording Exception** - If the Leave 3-Way Start Recording feature above is enabled with one of the EXCEPTIONS options, this will be a Settings Container of phone numbers, one per line, for 3way call phone numbers. Must be a Settings Container of the type PHONE\_NUMBERS to be available as an option on this menu. Default is DISABLED.

**Hangup Xfer Recording Start** - If this option is enabled, recording of the session will start when the agent clicks on the HANGUP XFER button in the transfer conference section. Default is N for disabled.

**Park Call IVR** - This option will allow an agent to park a call with a separate IVR PARK CALL button on their agent interface if this is ENABLED or ENABLED\_PARK\_ONLY. The ENABLED\_PARK\_ONLY option will allow the agent to send the call to park but not click to retrieve the call like the ENABLED option. The ENABLED\_BUTTON\_HIDDEN option allows the function through the API only. Default is DISABLED. This feature requires Asterisk 1.8 or higher to work.

**Park Call IVR AGI** - If the Park Call IVR field is not DISABLED, then this field is used as the AGI application string that the customer is sent to. This is a setting that should be set by your administrator

if possible. This feature requires Asterisk 1.8 or higher to work.

**Timer Action** - This feature allows you to trigger actions after a certain amount of time. the D1 through D5 DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE\_ONLY will simply display the message that is in the field below. NONE will disable this feature, and is the default setting. HANGUP will hang up the call when the timer is triggered, CALLMENU will send the call to the Call Menu specified in the Timer Action Destination field, EXTENSION will send the call to the Extension that is specified in the Timer Action Destination field, IN\_GROUP will send the call to the In-Group specified in the Timer Action Destination field.

**Timer Action Message** - This is the message that appears on the agent screen at the time the Timer Action is triggered.

**Timer Action Seconds** - This is the amount of time after the call is connected to the customer that the Timer Action is triggered. Default is -1 which is also inactive.

**Timer Action Destination** - This field is where you specify the Call Menu, Extension or In-Group that you want the call sent to if the Time Action is set to CALLMENU, EXTENSION or IN\_GROUP. Default is empty.

**Scheduled Callbacks** - This option allows an agent to disposition a call as CALLBK and choose the data and time at which the lead will be re-activated. For this option to work, the agents in the campaign must also have their Dialer user option for scheduled callbacks enabled. If you want the agents in this campaign to have USERONLY callbacks, where they can reserve a callback for only themselves, their Dialer user options for Agent only callbacks should be enabled.

**Scheduled Callbacks Alert** - This option allows the callbacks status line in the agent interface to be red, blink or blink red when there are AGENTONLY scheduled callbacks that have hit their trigger time and date. Default is NONE for standard status line. The DEFER options will stop blinking and-or displaying in red when you check the callbacks, until the number of callbacks changes. An option can be added to the AST\_DB\_dead\_cb\_purge.pl script to remove duplicate callback entries for a single lead, keeping the newest one only (contact your administrator to set this up).

**Send Callbacks Email** - This option will cause the dialer to attempt to send an email notification to the owner of a USERONLY scheduled callback when the callback time arrives. In order for this to work, the owner must have a valid email address on their user profile, and the system must have a settings container named AGENT\_CALLBACK\_EMAIL in the Settings Container section of the admin portal. That container must also define the following variables for the email to be sent properly: email\_from - the email address the notification shows as coming from, email\_subject - the subject shown on the email, and email\_body\_begin which when declared will treat all text between it and the string email\_body\_end as the body of the email. Values from the lead ,the dialer \_list table, can be included using the same --A---- B-- declaration style used in the scripts feature. These emails are only sent when the agent is logged into the agent screen.

**Scheduled Callbacks Count** - This option allows you to limit the viewable callbacks in the agent callback alert section on the agent screen, to only LIVE callbacks. LIVE callbacks are user-only

scheduled callbacks that have hit their trigger date and time. ACTIVE call backs are user-only callbacks that are active in the system but have not yet triggered. You can view both ACTIVE and LIVE callbacks by selecting ALL\_ACTIVE. Default is ALL\_ACTIVE.

**Scheduled Callbacks Days Limit** - This option allows you to reduce the agent scheduled callbacks calendar to a selectable number of days from today, the full 12 month calendar will still be displayed, but only the set number of days will be selectable. Default is 0 for unlimited.

**Scheduled Callbacks Hours Block** - This option allows you to restrict a USERONLY scheduled callback from being displayed on the agent callback list until X hours after it has been set. Default is 0 for no block.

**Scheduled Callbacks Calltime Block** - This option if enabled will prevent the scheduled callback in the agent callback list from being dialed if it is outside of the scheduled calltime for the campaign. Default is DISABLED.

**Scheduled Callbacks Active Limit** - This option if enabled will limit an agent to this number of active or live user-only callbacks. If the limit is reached, the agent will not be able to select the My Callback checkbox when setting a callback for a lead. Default is 0 for disabled.

**Scheduled Callbacks Active Limit Override** - Enabling this option will allow the Custom User 3 field to override the Scheduled Callbacks Active Limit. Default is N for disabled.

**Scheduled Callbacks Display Days** - Enabling this option will restrict the scheduled callbacks listings on the agent screen to showing only callbacks set to trigger a number of days from today. The -day- is a standard calendar day, so if this is set to 1, only the current callbacks for today until midnight will be displayed. Default is 0 for disabled.

**Anyone Callbacks DNC Filter** - This option if enabled will check the ANYONE scheduled callbacks phone numbers against the DNC options that are enabled for this campaign before they are put into the hopper to be dialed. Default is DISABLED. This setting does not affect USERONLY scheduled callbacks. If you want to filter those for DNC phone numbers, you should use the Manual Dial Filter settings.

**My Callbacks Checkbox Default** - This option allows you to pre-set the My Callback checkbox on the agent scheduled callback screen. CHECKED will check the checkbox automatically for every call. Default is UNCHECKED.

**Show Previous Callback** - This option if enabled will show on the agent screen with a separate yellow panel information about the previously set callback that the agent has up on their screen. Disabling this option will not show that panel. Default is ENABLED.

**Scheduled Callbacks Useronly Move Minutes** - This option if set to a number greater than 0, will change all USERONLY Scheduled Callbacks that are X minutes after their callback time to ANYONE callbacks. This process runs every minute. Default is 0 for disabled.

**Next-Dial My Callbacks** - This option only works for MANUAL and INBOUND\_MAN dial methods, and also only if No Hopper Dialing is enabled. This feature will look for Scheduled Callbacks that have



triggered for the agent and dial them next when the agent clicks on the Dial Next Number button on their agent screen. There is a per-user override option for this setting as well. Default is DISABLED.

**Scheduled Callbacks Force Dial** - This feature will force an agent to a paused state and block out their screen with the next triggered USERONLY scheduled callback to be called. The agent's only option will be to dial this callback, although they are able to look at lead info before they do that. If there are multiple triggered scheduled callbacks for the agent, they all must be called before the agent can move on to handling other items. This feature will not pay attention to the Call Time that is set for the campaign, so these calls may be dialed outside of the set call time. The agent must be able to place manual dial calls for this feature to work. Default is N for disabled.

**Scheduled Callbacks Local Timezones** - This feature allows agents to set scheduled callbacks with a customer local time and timezone. If set to something other than ---DISABLED---, the selected TIMEZONE\_LIST type of Settings Container will be used to display a list of time zones in the Scheduled Callback panel of the agent screen that would be used to set the scheduled callback by one of those local times. A TIMEZONE\_LIST type of Settings Container would need to be created that will contain one timezone per line with each line containing the 3-letter Country Code, the TimeZone Code, a Y or N for whether Daylight Saving Time is observed in that zone, and a short description of the time zone as you want it to appear to the agents. For example, for the Eastern United States time zone, you could put -USA,EST,Y,Eastern Time Zone-, without the dashes. To see a list of the available time zone combinations on your system, go to the Admin, System Settings page and click on the -Phone Codes- link on that page. Default is DISABLED, and the scheduled callbacks screen will use the agent server time to set callbacks.

**Scheduled Callbacks Auto Reschedule** - This feature only affects ANYONE scheduled callbacks. If DAY\_1 is used, it will automatically reschedule lead lead to be called back on the next calling day at the same time they were called if the resulting disposition of the call was not a Human Answer -Y- status. The next calling day is determined by the Call Time that is set for the campaign. In the case of DAY\_1, if tomorrow is not an allowed calling day, the system will look at the next day and then the next day until it finds the next allowable calling day to set the ANYONE scheduled callback for. There are up to 6 DAY options, then there are up to 3 WEEK options, then there are up to 6 MONTH options. Default is DISABLED.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the call is considered a DROP, only applies to outbound calls. To comply with the USA FTC Safe-Harbor regulations for business to consumer calls we recommend that you set this to 5 seconds at most.

**Drop Call Action** - This menu allows you to choose what happens to a call when it has been waiting for longer than what is set in the Drop Call Seconds field. HANGUP will simply hang up the call, AUDIO plays the Safe Harbor audio file, MESSAGE will send the call the Drop Exten that you have defined below, VOICEMAIL will send the call to the voicemail box indicated below, CALLMENU will send the call to the Call Menu defined below, and IN\_GROUP will send the call to the Inbound Group that is defined below.

**Safe Harbor Exten** - This is the dialplan extension that the desired Safe Harbor audio file is located at on your server.

**Safe Harbor Audio** - This is the audio prompt file that is played if the Drop Action is set to AUDIO.

Default is buzz.

**Safe Harbor Audio Field** - defines a field in the list that the system will use as the audio filename for each lead in place of the Safe Harbor Audio file. If this is set to DISABLED the Safe Harbor Audio file will always be used. The system will do no validation to make sure that the audio file exists other than to make sure the value of the field is at least one character, so to have the lead to use the default Safe harbor Audio, simply set the field value in the lead to empty. The pipe character can be used to link multiple audio files together in the field value for each lead. Default is DISABLED. Here is the list of fields that can be used for this setting: *vendor\_lead\_code, source\_id, list\_id, phone\_code, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, alt\_phone, email, security\_phrase, comments, rank, owner, entry\_list\_id*

**Safe Harbor Call Menu** - This is the call menu that a call is sent to if the Drop Action is set to CALLMENU.

**Voicemail** - If defined, calls that would normally DROP would instead be directed to this voicemail box to hear and leave a message.

**Drop Transfer Group** - If Drop Action is set to IN\_GROUP, the call will be sent to this inbound group if it reaches Drop Call Seconds.

**Hide Customer Hangup Button** - This setting will hide the agent screen Hangup Customer button, and the Transfer Conference frame Hangup Both button, for agents logging in to this campaign. This option should only be used if the campaign is using a custom application to hang up customer phone calls through the Agent API. Default is N for disabled.

**Disable Dispo Screen** - This option allows you to disable the disposition screen in the agent interface. The Disable Dispo Status field below must be filled in for this option to work. Default is DISPO\_ENABLED. The DISPO\_SELECT\_DISABLED option will not disable the dispo screen completely, but will display the dispo screen without any dispositions, this option should only be used if you want to force your agents to use your CRM software which will send the status to the system through the API.

**Disable Dispo Status** - If the Disable Dispo Screen option is set to DISPO\_DISABLED, then this field must be filled in. You can use any disposition you want for this field as long as it is 1 to 6 characters in length with only letters and numbers.

**Wrapup Seconds** - The number of seconds to force an agent to wait before allowing them to receive or dial another call. The timer begins as soon as an agent hangs up on their customer - or in the case of alternate number dialing when the agent finishes the lead - Default is 0 seconds. If the timer runs out before the agent has dispositioned the call, the agent still will NOT move on to the next call until they select a disposition. There is also a link on the Wrapup screen for the agent to be able to override the wrapup timer and move on to the next call.

**Wrapup Message** - This is a campaign-specific message to be displayed on the wrapup screen if wrapup seconds is set.

**Wrap Up Bypass** -If set to ENABLED then the agent will be able to click a link to stop the Wrap Up timer before the time is completed. Default is ENABLED.

**Wrap Up After Hotkey** -If set to ENABLED and the campaign has hotkeys configured and the agent terminates a call with a hotkey, then the wrap up settings will be used after that call. Default is DISABLED.

**Agent Call Hangup Route** - This setting will determine what happens when the agent clicks on the Hangup Customer button on the agent screen. HANGUP will hang up the call, MESSAGE will play an audio file to the customer then hang up the call, EXTENSION will blind-transfer the call to the defined dialplan extension, IN\_GROUP will blind-transfer the call to the defined inbound Group, CALLMENU will blind-transfer the call to the defined Call Menu. Default is HANGUP.

**Agent Call Hangup Value** - If the Agent Call Hangup Route above is set to MESSAGE, EXTENSION, IN\_GROUP or CALLMENU, then this is the value of the selected route that the call will be sent to. If the Agent Call Hangup Route above is set to anything but HANGUP, then this value is required to be populated with a valid option for this function to work properly. Default is blank.

**Agent Hangup In-Group Override** - This option, if enabled, will override any post-call survey options that may be enabled in the In-Groups for calls that go to agents in this campaign. Default is N for disabled.

**Dead Call Trigger Action** - If you want to trigger an audio message to an agent or send a back-end URL request when an agent has been in a dead call for a set number of seconds, you can enable that here. Default is DISABLED.

**Dead Call Trigger Seconds** - If this is set to a number greater than 0, and the Dead Call Trigger Action is not DISABLED, this is the number of seconds an agent is in a dead call that will trigger the Action selected above. Default is 0.

**Dead Call Trigger Repeat** - If you want the Dead Call Trigger Action to repeat after the set number of seconds, you can enable that in this setting. Default is NO.

**Dead Call Trigger Audio** - If the Dead Call Trigger Action is set to use AUDIO, this is where you specify the audio file to be played to the agent when the dead call seconds trigger time has been reached.

**Dead Call Trigger URL** - If the Dead Call Trigger Action is set to use URL, this is where you specify the URL to be requested on the back-end when the dead call seconds trigger time has been reached.

**Dead Call Max Seconds** -If this is set to greater than 0, after a customer hangs up and the agent has not clicked on the Hangup Customer button in this number of seconds, the call will automatically be hung up, the status below will be set and the agent will be paused. Default is 0 for disabled.

**Dead Call Max Status** -If Dead Call Max Seconds is enabled, this is the status set for the call when the agent dead call is not hung up past the number of seconds set above. Default is DCMX.

**Dead Call to Dispo Only** - If Dead Call Max Seconds is set greater than 0, this option can be enabled

if you want to send the agent to the dispo screen after a dead call without automatically dispositioning it. Default is DISABLED.

**Dispo Call Max Seconds** -If this is set to greater than 0, and the agent has not selected a disposition status in this number of seconds, the call will automatically be set to the status below and the agent will be paused. Default is 0 for disabled.

**Dispo Call Max Status** -If Dispo Call Max Seconds is enabled, this is the status set for the call when the agent has not selected a status past the number of seconds set above. Default is DISMX.

**Agent Pause Max Seconds** -If this is set to greater than 0, and the agent has not gone out of PAUSED status in this number of seconds, the agent will automatically be logged out of the agent screen. Default is 0 for disabled.

**Agent Pause Max Status** - If Agent Pause Max Seconds is enabled, this is the status set for the call when the agent has not selected a status past the number of seconds set above. This situation can happen when manual alt dial is enabled and the agent has not finished the lead they are on. Default is PAUSMX.

**Agent Pause Max Exceptions** - This setting will allow you to define a set of Pause Codes that do not trigger the Agent Pause Max Seconds feature if it is active if the agent has selected one of them as their current pause code. These pause codes must be defined within a Settings Container of the PAUSE\_CODES\_LIST type with one pause code per line. Default is blank for disabled.

**Pause Max URL** - If Agent Pause Max Seconds is enabled and triggered in the agent screen, then this URL will be requested from the back-end of the webserver. Default is blank for inactive.

**Agent Ready Max Seconds Logout** - If this is set to greater than 0, and the agent has not gone out of READY or CLOSER status in this number of seconds, the agent will automatically be logged out of the agent screen. Default is 0 for disabled.

**Inbound Manual Dial Agent Forced Ready Seconds** - If the Dial Method is set to INBOUND\_MAN, and this setting is set to a number greater than 0, this will be the number of seconds the agent has to be in the READY state, able to take an inbound call, before the DIAL NEXT NUMBER agent screen button can be clicked each time. Default is 0, for disabled.

**InMan Agent Forced Ready Override Container** - If the Inbound Manual Dial Agent Forced Ready Seconds setting above is active, this setting will allow you to override that setting based upon the day-of-the-week and the time-of-day. In a WEEKDAY\_TIMERANGE\_SECONDS Settings Container you can set multiple lines of overrides, one per line, for this Campaign using the following format with each field separated by commas,

day-of-week,start-time,end-time,inman-force-ready-seconds-override

The day-of-week can be a single day, MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY or it can be set to ALLDAYS for all 7 days a week.

The start-time and end-time both need to each be set to a four-digit time, based on 24-hour time, such as 1700 for 5:00pm server time.

The inman-force-ready-seconds-override needs to be a number of seconds.

For example, if you have a line like the following,

MONDAY,0900,0930,30

Then on Mondays only from 9:00am to 9:30am, the Agent Forced Ready Seconds will be 30 seconds instead of what it is set to in the Campaign Agent Forced Ready Seconds setting.

NOTE, if there is more than one entry that will match the day and time, the last one in the settings container will be the one that is used.

Here is an example WEEKDAY\_TIMERANGE\_SECONDS Settings Container entry,

```
;day-of-week,start-time,end-time,inman-force-ready-seconds-override  
ALLDAYS,1200,1300,30  
MONDAY,0900,0930,20  
FRIDAY,1515,1700,60  
FRIDAY,1725,1730,5
```

**Max Logged-In Agents** - This setting allows you to set a maximum number of agents that can be logged into this campaign at any time. Default is 0 for the limit being disabled.

**Customer Gone Warning Seconds** - This setting controls the number of seconds after a customer hangs up before a warning that the customer has hung up will appear on the agent screen. Default is 30.

**SIP Event Actions** - SIP Event Logging Actions allows you to select a SIP\_EVENT\_ACTIONS Settings Container that contains all of the rules that you want followed for calls based upon different SIP Event Log triggers. Default is DISABLED.

**Use Internal DNC List** - This defines whether this campaign is to filter leads against the Internal DNC list, and insert leads into the DNC list if they are dispositioned as DNC by an agent in this campaign. If it is set to Y, the hopper will look for each phone number in the DNC list before placing it in the hopper. If it is in the DNC list then it will change that lead status to DNCL so it cannot be dialed. Default is N.

**Use Campaign DNC List** - This defines whether this campaign is to filter leads against the DNC list that exists only for this campaign, and insert leads into the campaign-specific DNC list if they are dispositioned as DNC by an agent in this campaign. If it is set to Y, the hopper will look for each phone number in the campaign-specific DNC list before placing it in the hopper. If it is in the campaign-specific DNC list then it will change that lead status to DNCC so it cannot be dialed. Default is N.

**Other Campaign DNC** - If the option Use Campaign DNC List is enabled, it can allow you to use a different campaign DNC list. Enter the Campaign ID of the other campaign in this field. If this option is used, the original campaign DNC list will not be checked. Only the OTHER campaign DNC list will be used. This does not affect use of the Internal System DNC list. Default is EMPTY.

**Agent Pause Codes Active** - Allows agents to select a pause code when they click on the PAUSE button in Dialer agent interface. Pause codes are definable per campaign at the bottom of the campaign view detail screen and they are stored in the Dialer\_agent\_log table. FORCE will force the agents to choose a PAUSE code if they click on the PAUSE button. Default is N.

**Auto Pause Pre-Call Work** - In auto-dial mode, when enabled this setting, will set the agent to paused automatically when the agent clicks on any of the following functions that requires them to be paused- Manual Dial, Fast Dial, Lead Search, Call Log View, Callbacks Check, Enter Pause Code. Default is N

for inactive.

**Auto Resume Pre-Call Work** - In auto-dial mode, this setting if enabled will set the agent to active automatically when the agent clicks out of, or cancels, on any of the following functions that requires them to be paused- Manual Dial, Fast Dial, Lead Search, Call Log View, Callbacks Check, Enter Pause Code. Default is N for inactive.

**Auto Pause Pre-Call Code** - If the Auto Pause Pre-Call Work function above is active, and Agent Pause Codes is active, this setting will be the pause code that is used when the agent is paused for these activities. Default is PRECAL.

**Campaign Stats Refresh** - This checkbox will allow you to force a Dialer stats refresh, even if the campaign is not active. The Dialer stats are shown on the campaign real-time report(AST\_timeonVDADall.php).

**Real-Time Agent Time Stats** - Setting this to anything but DISABLED will enable the gathering of agent time stats for today for this campaign, viewable through the Real-Time report. CALLS are the average calls handled per agent, WAIT is the average agent wait time, CUST is the average customer talk time, ACW is the average After Call Work time, PAUSE is the average pause time. Default is DISABLED.

**Disable Alter Customer Data** - If set to Y, does not change any of the customer data record when an agent dispositions the call even if they have altered customer information. Default is N.

**Disable Alter Customer Phone** - If set to Y, The customer phone number will be displayed on the agent screen, but they can not edit it. Default is N.

**Allow No-Hopper-Leads Logins** - If set to Y, allows agents to login to the campaign even if there are no leads loaded into the hopper for that campaign. This function is not needed in CLOSER-type campaigns. Default is N.

**No Hopper Dialing** - If This is enabled, the hopper will not run for this campaign. This option is only available when the dial method is set to MANUAL or INBOUND\_MAN. It is recommended that you do not enable this option if you have a very large lead database, over 100,000 leads. With No Hopper Dialing, the following features do not work: lead recycling, auto-alt-dialing, list mix, list ordering with Xth NEW. If you want to use Owner Only Dialing you must have No Hopper Dialing enabled. Default is N for disabled.

**Owner Only Dialing** - If This is enabled, the agent will only receive leads that they are within the ownership parameters for. If this is set to USER then the agent must be the user defined in the database as the owner of this lead. If this is set to TERRITORY then the owner of the lead must match the territory listed in the User Modification screen for this agent. If this is set to USER\_GROUP then the owner of the lead must match the user group that the agent is a member of. For this feature to work, the dial method must be set to MANUAL or INBOUND\_MAN and No Hopper Dialing must be enabled. If the option has BLANK at the end, then users are allowed to dial leads with no owner defined, in addition to owner defined leads. Default is NONE for disabled.

NOTE: if you are using USER-based owner only dialing, there is a manager utility available to allow you to reassign leads from one user to another. This utility will be available on your admin web server

at your server address: [http://<server>/dialer/bench\\_agent\\_assign.php](http://<server>/dialer/bench_agent_assign.php)

**Owner Populate** - If this is enabled and the owner field of the lead is blank, the lead's owner field will populate with the user ID of the agent that handles the call first. Default is DISABLED.

**Agent Select Territories** - If this option is enabled and the agent belongs to at least one territory, the agent will have the option of selecting territories to dial leads from. The agent will see a list of available territories upon login and they will have the ability to go back to that territory list when paused to change their territories. For this function to work the Owner Only Dialing option must be set to TERRITORY and User Territories must be enabled in the System Settings.

**Agent Display Dialable Leads** - This option if enabled will show the number of dialable leads available in the campaign in the agent screen. This number is updated in the system once a minute and will be refreshed on the agent screen every few seconds.

**Agent Screen Labels** - You can select a set of agent screen labels to use with this option. Default is --SYSTEM-SETTINGS-- for the default labels. Additional labels can be created in the Admin section, by selecting the "Screen Labels" link.

**Allow Required Fields** -Must be enabled for required fields as defined in screen labels to work. Once a field is designated as required, the agent will not be allowed to hang up a lead until there is something filled in within that field, this will affect all calls the agent receives or places. Default is N for disabled.

**Status Display Fields** - You can select which variables for calls will be displayed in the status line of the agent screen. CALLID will display the 20 character unique call ID, LEADID will display the system lead ID, LISTID will display the list ID. Default is CALLID.

**Status Display In-Group** -This option if set to ENABLED will display the In-Group name in the agent screen when an inbound call is sent to the agent. Default is ENABLED.

**Agent Display Fields** -This option allows you to display hidden fields as read-only in the agent screen. Available fields are entry\_date, source\_id, date\_of\_birth, rank, owner, last\_local\_call\_time. Default is blank.

**Agent Screen Time Display** - This option allows you to display a link on the agent screen that when clicked will open a frame showing the agent their time statistics for the day. There are several options that will determine what information is displayed. If RANGE is in the option, it will allow the agent to select a date range to see stats from. If EXTENDED is in the option, it will show additional columns and separate the time by campaign. Default is DISABLED.

**Agent Display Queue Count** - If set to Y, when a customer is waiting for an agent, the Queue Calls display at the top of the agent screen will turn red and show the number of waiting calls. Default is Y.

**Calls In Queue Count Display** - This setting, if set to a valid CALLS\_IN\_QUEUE\_COUNT type Settings Container, will change the display at the top of the agent screen to a specific filtered count of the calls in queue, replacing the default display of the count of every call waiting in queue that the agent has permissions to handle. If both of these settings are enabled, the first one will display before the second one. If you use an EXCEPT option, the exception container cannot also use an EXCEPT

option. Default is ---DISABLED---. The CALLS\_IN\_QUEUE\_COUNT type Settings Container should have -HEADING=>Display Name- as its first line, without the dashes, and then either a list of In-Groups and Campaigns, or one of the following special options,

--ALL-IN-GROUP-CALLS--  
--ALL-CAMPAIGN-CALLS--  
--ALL-CALLS--  
--ALL-IN-GROUP-CALLS-EXCEPT=container\_id  
--ALL-CAMPAIGN-CALLS-EXCEPT=container\_id  
--ALL-CALLS-EXCEPT=container\_id

**Agent View Calls in Queue** - If set to anything but NONE, agents will be able to see details about the calls that are waiting in queue in their agent screen. If set to a number value, the calls displayed will be limited to the number selected. Default is NONE.

**View Calls in Queue Launch** - This setting if set to AUTO will have the Calls in Queue frame show up upon login by the agent into the agent screen. Default is MANUAL.

**Calls in Queue Extra Column** - If not DISABLED, this will display an extra column in the -Calls in Queue- agent screen frame for each call waiting in queue. You can select any of the standard list field columns, the headers will use the same labels as are set for the campaign screen labels. Default is DISABLED.

**Agent Grab Calls in Queue** - This option if set to Y will allow the agent to select the call that they want to take from the Calls in Queue display by clicking on it while paused. Agents will only be able to grab inbound calls or transferred calls, not outbound calls. Default is N.

**Agent Call Re-Queue Button** - This option if set to Y will add a Re-Queue Customer button to the agent screen, allowing the agent to send the call into an AGENTDIRECT queue that is reserved for the agent only. Default is N.

**Agent Pause After Each Call** - This option if set to Y will pause the agent after every call automatically. Default is N.

**Agent Pause After Next Call Link** – When enabled, this displays a link on the agent screen that will allow them to go on pause automatically after they hang up their next call. Default is DISABLED.

**Manual Dial Override** - The setting can override the Users setting for manual dial ability for agents when they are logged into this campaign. NONE will follow the Users setting, ALLOW\_ALL will allow any agent logged into this campaign to place manual dial calls, DISABLE\_ALL will not allow anyone logged into this campaign to place manual dial calls. Default is NONE.

**Manual Dial Override Field** -The setting if set to ENABLED will show the Manual Dial Override field in the agent screen. Default is ENABLED.

**Manual Dial List ID** - The default list\_id to be used when an agent places a manual call and a new lead record is created in Dialer\_list. Default is 999. This field can contain digits only.

**Manual Dial Filter** - This allows you to filter the calls that agents make in manual dial mode for this



campaign by any combination of the following: DNC - to kick out, CAMPAIGNLISTS - the number must be within the lists for the campaign, NONE - no filter on manual dial or fast dial lists. CAMPLISTS\_ALL - will include inactive lists in the search for the number. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number. As for the DNC options, DNC will use the campaign settings for DNC filtering, CAMPDNC will ignore the campaign DNC settings and will use the this campaign DNC list, INTERNALDNC will ignore the campaign DNC settings and will use the internal DNC list, SYSTEM - will include all phone numbers in the system, CALLBACK - must be set as an ACTIVE or LIVE Scheduled Callbacks.

**Manual Preview Dial** - This allows the agent in manual dial mode to see the lead information when they click Dial Next Number before they actively dial the phone call. There is an optional link to SKIP the lead and move on to the next one if selected. Default is PREVIEW\_AND\_SKIP.

**Manual Dial Search Checkbox** -This allows you to define if you want the manual dial search checkbox to be selected by default or not. If an option with RESET is chosen, then the checkbox will be reset after every call. If an option with LOCK is chosen, then the agent will not be able to click on the checkbox. Default is SELECTED.

**Manual Dial Search Filter** -This allows the agent to search only within lists belonging to this campaign when the agent has the Manual Dial Search Checkbox selected in the manual dial screen. The options are, CAMPLISTS\_ONLY - will check for the number within the active lists for the campaign, CAMPLISTS\_ALL - will also include inactive lists in the search for the number, NONE - no filter on manual dial searching. Default is NONE. If a lead is not found, then a new lead will be added. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number.

**Manual Dial by Lead ID** -This allows the agent in manual dial mode to place a call by lead\_id instead of a phone number. Default is N for disabled.

**Manual Call Time Check** - If this option is enabled, it will check all manual dial calls to make sure they are within the call time settings set for the campaign. Default is DISABLED.

**Manual Dial Validation** - If this option is enabled, every manual dial phone call from the agent screen that is triggered by only a click will require the agent to manually type in the phone number into a pop-up form on the agent screen to confirm the number to be dialed. This option can be forced as enabled through a system-wide setting. This feature will not affect 3way calls or transfers. Default is N for disabled.

**Manual Dial API** - This option allows you to set the Agent API to make either one call at a time, STANDARD, or the ability to queue up manual dial calls and have them dial automatically once the agent goes on pause or is available to take their next call with the option to disable the automatic dialing of these calls, QUEUE, or QUEUE\_AND\_AUTOCALL which is the same as QUEUE but without the option to disable the automatic dialing of these calls. If an agent has more than one call queued up for them they will see the count of how many manual dial calls are in queue right below the Pause button, or Dial Next Number button. We suggest that if QUEUE is used that you send API actions using the preview=YES option so you are not repeatedly dialing calls for the agent without notice. Also, if using QUEUE and heavily using manual dial calls in a non MANUAL dial method, we

would recommend setting the Agent Pause After Each Call option to Y. Default is STANDARD.

**Manual Dial CID** - This defines whether an agent making manual dial calls will have the campaign caller ID settings used, or their agent phone caller ID settings used. Default is CAMPAIGN. If the Use Custom CID campaign option is enabled or the list Campaign CID Override setting is used, this setting will be ignored. If the AGENT\_PHONE\_OVERRIDE option is used, it will override all other CID settings for manual dial calls placed from this campaign.

**Manual Dial Timeout** -This is an override field that, if populated, will override the campaign dial timeout setting for manual dialed calls. Default is blank for disabled.

**Phone Post Time Difference Alert** - This manual-dial-only feature, if enabled, will display an alert if the time zone for the lead postal code, or zip code, is different from the time zone of the area code of the phone number for the lead. The OUTSIDE\_CALLTIME\_ONLY option will only show the alert if the two time zones are different and one of the time zones is outside of the call time selected for the campaign. OUTSIDE\_CALLTIME\_PHONE will only check the time zone of the phone number of the lead and alert if it is outside of the local call time. OUTSIDE\_CALLTIME\_POSTAL will only check the time zone of the postal code of the lead and alert if it is outside of the local call time. OUTSIDE\_CALLTIME\_BOTH will check the postal code and phone number for being within the local call time, even if they are in the same time zone. These alerts will show in the call log info, callbacks list info, search results info, when a lead is dialed and when a lead is previewed. Default is DISABLED.

**In-Group Manual Dial** - allows you to enable agents to place manual dial outbound calls that are logged as in-group calls assigned to a specific in-group. The MANUAL\_DIAL option allows the placing of phone calls out through an In-Group to the agent placing the call. The NO\_DIAL option allows the agent to log time on a call that does not exist, as if it were a real call, this is often used for logging email or faxing time. The BOTH option will allow both call and no-call in-group dialing. The default is DISABLED.

**In-Group Manual Dial Select** - This option is only active if the above In-Group Manual Dial feature is not DISABLED. This option restricts the selectable In-Groups that the agent can place In-Group Manual Dial calls through. CAMPAIGN\_SELECTED will show only the in-groups that the campaign has set as allowable in-groups. ALL\_USER\_GROUP will show all of the in-groups that are viewable to the members of the user group that the agent belongs to.

**Manual Auto Next Seconds** -If the Dial Method is set to MANUAL or INBOUND\_MAN, then this setting will trigger the next lead to be automatically be dialed after this number of seconds. If enabled, it cannot be set lower than 5 seconds. Default is 0 for disabled.

**Manual Auto Next Options** - If the Manual Auto Next option is enabled above, then this setting will determine if the timer to automatically dial the next number will count down while the agent is paused or not. Default is DEFAULT, which will count down while the agent is paused.

**Manual Auto Next Show Timer** -If the Manual Auto Next Seconds option above is enabled, this setting will display a countdown timer to the agent if enabled. Default is N for disabled.

**Manual Alt Num Dialing** -This option allows an agent to manually dial the alternate phone number or

address3 field after the main number has been called. If the option has SELECTED in it then the Alt Dial checkbox will be automatically checked for each call. If the option has UNSELECTED in it then the Alt Dial checkbox will be automatically not checked for each call. If the option has TIMER in it then the Alt Phone or Address3 field will be automatically be dialed after Timer Alt Seconds. Default is N for disabled.

**Timer Alt Seconds** -If the Manual Alt Num Dialing setting has TIMER in it then the Alt Phone or Address3 field will be automatically be dialed after this number of seconds. Default is 0 for disabled.

**Agent Screen Clipboard Copy** - THIS FEATURE IS CURRENTLY ONLY ENABLED FOR INTERNET EXPLORER. This feature allows you to select a field that will be copied to the computer clipboard of the agent computer upon a call being sent to an agent. Common uses for this are to allow for easy pasting of account numbers or phone numbers into legacy client applications on the agent computer.

**Group Alias Allowed** - If you want to allow your agents to use group aliases then you need to set this to Y. Group Aliases are explained more in the Admin section, they allow agents to select different caller IDs for outbound manual calls that they may place. Default is N.

**Default Group Alias** - If you have allowed Group Aliases then this is the group alias that is selected first by default when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

**QM CallStatus Override** - If QueueMetrics integration is enabled in the system settings then this setting allow the overriding of the System Settings setting for CallStatus queue\_log entries. Default is DISABLED which will use the system setting.

**QM Phone Environment** - If QueueMetrics integration is enabled in the system settings then this setting allow the insertion of this data value in the data4 field of the queue\_log for agent activity records. Default is empty for disabled.

**Vtiger Search Category** - If Vtiger integration is enabled in the system settings then this setting will define where the vtiger\_search.php page will search for the phone number that was entered. There are 4 options that can be used in this field: LEAD- This option will search through the Vtiger leads only, ACCOUNT- This option will search through the Vtiger accounts and all contacts and sub-contacts for the phone number, VENDOR- This option will only search through the Vtiger vendors, ACCTID- This option works only for accounts and it will take the Dialer vendor\_lead\_code field and try to search for the Vtiger account ID. If unsuccessful it will try any other methods listed that you have selected. Multiple options can be used for each search, but on large databases this is not recommended. Default is LEAD. UNIFIED\_CONTACT- This option will use the beta Vtiger 5.1.0 feature to search by phone number and bring up a search page in Vtiger.

**Vtiger Search Dead Accounts** - If Vtiger integration is enabled in the system settings then this setting will define whether deleted accounts will be searched when the agent clicks WEB FORM to search in the Vtiger system. DISABLED- deleted leads will not be searched, ASK- deleted leads will be searched and the Vtiger search web page will ask the agent if they want to make the Vtiger account active, RESURRECT- will automatically make the deleted account active again and will take the agent to the account screen without delay upon clicking on WEB FORM. Default is DISABLED.

**Vtiger Create Call Record** - If Vtiger integration is enabled in the system settings then this setting will define whether a new Vtiger activity record is created for the call when the agent goes to the vtiger\_search page. Default is Y.

**Vtiger Create Lead Record** - If Vtiger integration is enabled in the system settings and Vtiger Search Category includes LEAD then this setting will define whether a new Vtiger lead record is created when the agent goes to the vtiger\_search page and no record is found to have the call phone number. Default is Y.

**Vtiger Screen Login** - If Vtiger integration is enabled in the system settings then this setting will define whether the user is logged into the Vtiger interface automatically when they login to Dialer . Default is Y. The NEW\_WINDOW option will open a new window upon login to the Dialer agent screen.

**Vtiger Status Call** - If Vtiger integration is enabled in the system settings then this setting will define whether the status of the Vtiger Account will be updated with the status of the Dialer call after it has been dispositioned. Default is N.

**PLLB Grouping** - Phone Login Load Balancing Grouping, only allowed if there are multiple agent servers and phone aliases are present on the system. If set to ONE\_SERVER\_ONLY it will force all agents for this campaign to login to the same server. If set to CASCADING it will group logged in agents on the same server until PLLB Grouping Limit number of agents are reached, then the next agent will login to the next server with the least number of agents. If set to DISABLED the standard Phone Aliases behavior of each agent finding the server with the least number of non-remote agents logged into it will be used. Default is DISABLED.

**PLLB Grouping Limit** - Phone Login Load Balancing Grouping Limit. If PLLB Grouping is set to CASCADING then this setting will determine the number of agents acceptable in each server for this campaign. Default is 50.

**CRM Popup Login** - If set to Y, the CRM Popup Address is used to open a new window on agent login to this campaign. Default is N.

**CRM Popup Address** - The web address of a CRM login page, it can have variables populated just like the web form address, with the VAR in the front and using --A--user\_custom\_one--B-- to define variables.

**Start Call URL** - This web URL address is not seen by the agent, but it is called every time a call is sent to an agent if it is populated. Uses the same variables as the web form fields and scripts. This URL can NOT be a relative path. For Manual dial calls, the Start Call URL will be sent when the call is placed. Default is blank.

**Dispo Call URL** - This web URL address is not seen by the agent, but it is called every time a call is dispositioned by an agent if it is populated. Uses the same variables as the web form fields and scripts. dispo, callback\_lead\_status, talk\_time and term\_reason are the variables you can use to retrieve the agent-defined disposition for the call and the actual talk time in seconds of the call as well as how the call was ended. This URL can NOT be a relative path. Default is blank. NOTE: Leads statused with a

specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. Or DROP calls could be sent to a list on list in another campaign, so that those customers can be given more care. The script can also be found in the Non-agent API document: `VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1`

You can even send different statuses to various other lists (exp. "STATUS 1" to LIST A, while sending "STATUS 2" to LIST B). You will just need to affix `_1` to the end of each specific variable comment (The next would be `_2` then `_3` and so on). The Script example below shows exactly how this would work. You can send leads to up to 99 different lists.

If you set the Dispo Call URL field to "ALT" and submit, then a new link to the Alternate Dispo Call URL amin page will appear. This page will allow you to set multiple Dispo Call URLs that can all be executed after a call is dispositioned by an agent. This page also has more options on when to execute these Alternate Dispo Call URLs by a list of statuses and/or lists.

**Alternate Multi URLs** - This page allows you to define Alternate URLs with conditions in place of the simple URL option for Dispo, Start, Add Lead or No Agent URLs. The RANK field will define the order in which the URLs are requested, this is important because if you have a URL that may take a few seconds to run ranked as 1, that will mean that any URLs ranked after it will have to wait to be run until that first URL request receives a response. The ACTIVE field will determine whether the specific URL is run. The STATUSES field only works for the Dispo URLs and will determine which disposition statuses will trigger the URL being run, if you want to run the entry for all statuses just fill in `---ALL---` in this field, if you want only a few statuses, separate them by spaces. If populated, the LISTS field will limit the calls that the URL is run from to only the list IDs listed in this field. To have it run for all lists, leave the field blank, if you want only a few lists, separate them by spaces. The MIN LENGTH field will limit the calls that the URL is run for to only calls that are this minimum length in seconds and higher, default is 0. The min length option does not work for No Agent Call URLs. The URL field works the same as it would in the URL option in campaigns, in-groups and lists, and it is also limited to 2000 characters in length. If you want to delete a URL, it must first be set to not active, then you can click on the DELETE link below the SUBMIT button for that URL entry.

**No Agent Call URL** - This web URL address is not seen by the agent, but if it is populated it is called every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. The variable `--A--dispo--B--` can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank. If you put ALT into this field and submit this form, you will be able to go to a separate page where you can define multiple URLs for this action as well as specific statuses that will trigger them.

**Extension Append CID** - If enabled, the calls placed from this campaign will have a space and the phone extension of the agent appended to the end of the Caller ID name for the call before it is sent to the agent. Default is N for disabled. If USER is part of the option, then the user ID will be used instead of the phone extension. If WITH\_CAMPAIGN is used, then another spae and the campaign ID will be included as well.

**Blind Monitor Warning** - This option if enabled will let the agent know in various optional ways if they are being blind monitored by someone. DISABLED means this feature is not active, ALERT will

only pop an alert up on the agent screen, NOTICE will post a note that stays up on the agent screen as long as they are being monitored, AUDIO will play the filename defined below when an agent is starting to be monitored and the other options are combinations of the above options. Default is DISABLED.

**Blind Monitor Notice** - This is the message that will show on the agent screen while they are being monitored if the NOTICE option is selected. Default is -Someone is blind monitoring your session-.

**Blind Monitor Filename** - This is the audio file that will play in the agents session at the start of someone blind monitoring them. This prompt will be played for everyone in the session including the customer if any is present. Default is empty.

**Allowed Inbound Groups** - For CLOSER campaigns only. Here is where you select the inbound groups you want agents in this CLOSER campaign to be able to take calls from. It is important for BLENDED inbound/outbound campaigns only to select the inbound groups that are used for agents in this campaign. The calls coming into the inbound groups selected here will be counted as active calls for a blended campaign even if all agents in the campaign are not logged in to receive calls from all of those selected inbound groups.

**Default Transfer Group** - This field is the default In-Group that will be automatically selected when the agent goes to the transfer-conference frame in their agent interface.

**Agent Transfer In-Group Validation** - This option involves the agents that show up in the agent selection screen when an agent is transferring a call to another agent using an AGENTDIRECT in-group. Enabling this option will ensure that the agents listed as available to transfer to have selected the AGENTDIRECT in-group that was chosen by the agent originating the transfer. For example, if the originating agent has selected the AGENTDIRECT\_2 in-group, then when that agent clicks on the AGENTS link to select another agent to transfer the call to, only agents that have selected to take calls from the AGENTDIRECT\_2 in-group will be shown.

**Transfer In-Group Sort Order** - This setting allows you to select the order in which the Transfer Inbound Groups are displayed within the Local Closer pull-down menu on the agent screen. GROUP\_ID will sort by the Inbound Group ID, GROUP\_NAME will sort by the Inbound Group Name, and PRIORITY will sort by the Queue Priority. Selecting an option with UP in it will sort with the lowest alphanumeric value at the top, while selecting an option with DOWN in it will sort with the lowest alphanumeric value at the bottom of the select list. Default is GROUP\_ID\_UP.

**Allowed Transfer Groups** - With these checkbox listings you can select the groups that agents in this campaign can transfer calls to. Allow Closers must be enabled for this option to show up.

## Lists Within This Campaign

This section will show you all of the lists that are assigned to this campaign. You can see the list ID, name, description, number of leads in the list, whether the list is active and what date and time the last call was placed from the list. Also in this section is the ability to set lists to active and inactive in bulk by checking or unchecking the checkbox in each list record and then clicking on the SUBMIT ACTIVE LIST CHANGES button.

## Dialable Leads and Leads in the Hopper

There is a tally of the dialable leads in this campaign as well as a count of the total number of leads in the hopper. Also, below those lines is a link to see what leads are in the hopper. That report shows you more detail information on the leads in the hopper including the called count, status, phone number state and other information.

## Campaign Ranks and Call Counts

There is a section in the Basic View for Campaigns at the bottom of the screen that shows the ranks for all agents for a campaign and the number of calls that each agent has taken in that campaign for the day.

## Test Outbound Call

This setting enables the ability to enter a phone code and phone number into fields at the bottom of the Campaign Detail screen and place a phone call to that number as if it were a lead being auto-dialed in the system. The phone number will be stored as a new lead in the manual dial list ID list. The campaign must be active for this feature to be enabled, and it is recommended that the lists assigned to the campaign all be set to inactive. The dial prefix, dial timeout and all other dialing related features, except for DNC and call time options, will affect the dialing of the test number. The phone call will be placed on the server selected as the voicemail server in the system settings. Default is 0 for disabled.

## Campaign-Specific Custom Statuses

Through the use of custom campaign statuses, you can have statuses that only exist for a specific campaign. The Status must be 1-6 characters in length, the description must be 2-30 characters in length and the "Agent Selectable" field defines whether it shows up in the agent interface as a disposition. In this section of the Campaign Modification Detail screen you can add new Custom Statuses one at a time or remove existing ones by clicking on the DELETE link next to the status listing. For the Campaign's DNC and campaign-DNC list settings to work properly you must remember to properly set the Campaign and System Statuses to DNC=Y if you want the status to be a DNC-list-insert status. The human\_answered field is used when calculating the drop percentage, or abandon rate. Setting human\_answered to Y will use this status when counting the human-answered calls. The Category option allows you to group several statuses into a category that can be used for statistical analysis. There are also 7 additional settings that will define the kind of status: sale, dnc, customer contact, not interested, unworkable, scheduled callback, completed. The MIN SEC and MAX SEC fields for each status will determine whether an agent can select that status at the end of their call based upon the length of the call. If the call is 10 seconds and the MIN SEC for a status is set to 20 seconds, then the agent will not be able to select that status. Also, if a call is 40 seconds and the MAX SEC for a status is set to 30 seconds, then the agent will not be able to select that status.

## Campaign Hotkeys

Through the use of custom campaign hotkeys, agents that use the Dialer web-client can hangup and disposition calls just by pressing a single numeric key on their keyboard. You need to choose a number 1 through 9 and then select a status for that hotkey. Hotkeys are reloaded by the Dialer client when

the agent logs into a campaign.

There are two special HotKey options that you can use in conjunction with Alternate Phone number dialing if it is enabled for a campaign, ALTPH2 - Alternate Phone Hot Dial and ADDR3 ---- Address3 Hot Dial allows an agent to use a hotkey to hangup their call, stay on the same lead, and dial another contact number from that lead.

There are also 2 HotKey options (LTMG or XFTAMM) designed to be used with the Leave-Voicemail option. When either of these selections are chosen by the agent, it triggers an automatic transfer to the Answering Machine Message specified in the campaign. The call is instantly dispositioned and the agent is immediately available to take another call.

The LTMGAD and XAMMAD options will transfer to the Leave-Voicemail option as well as dispositioning the call.

## **Campaign Lead Recycling**

Through the use of lead recycling, you can call specific statuses of leads again at a specified interval without resetting the entire list. Lead recycling is campaign-specific and does not have to be a selected dial status in your campaign. The attempt delay field is the number of seconds until the lead can be placed back in the hopper, this number must be at least 120 seconds. The attempt maximum field is the maximum number of times that a lead of this status can be attempted before the list needs to be reset, this number can be from 1 to 10. You can activate and deactivate a lead recycle entry with the provided links. This feature is only recommended for Busy or "B" status leads. This feature is not intended to be used with settings of several days. When a lead's recycling target time hits it will be put into the dial hopper first before any other leads that would be put into the hopper regardless of how the lead order is set for the campaign.

## **Auto Alt-Number Dialing**

If the Auto Alt-Number Dialing field is set to anything but NONE, then the leads that are dispositioned under these auto alt dial statuses will have their alt\_phone and-or address3 fields dialed after any of these no-answer statuses are set. The Campaign Auto-Alt-Dial setting must be enabled for this to be active.

NOTE: MULTI\_LEAD Auto-Alt-Dial to use the Auto-Alt-Dial Statuses as set in the campaign automatically. If you are using MULTI\_LEAD you may need to add statuses like DROP, PDROP and others to your campaign's auto-alt dial statuses so that the other leads tied by vendor\_lead\_code in the campaign's lists are not deactivated. If MULTI\_LEAD is selected, then a new link will appear higher up on the Campaign Modification page that goes to a Multi-Lead Settings page where you can configure how you want the Multi-Lead auto-alt dialing to run. Also, if using MULTI\_LEAD, you may want to use the "agc/deactivate\_lead.php" as a script in your Campaign's Dispo Call URL entries to ensure that after contact is made that the other leads for the account are no longer being called.

## **Campaign List Mix**

The basic idea behind List Mix is to be able to define the leads that you want to dial with a high degree of control. You can define a set of statuses in a single list to take a percentage of the leads to dial out



of, and then take another percentage of leads from another set of statuses in another list. You can then have the leads called in order of priority, mixed evenly or called randomly from the selected groups. The issues with using List Mix are that you must have a clear idea of what leads you have available and keep on top of what you are dialing. You may run out of a specific groups of leads and you would be dialing leads that are not in the percentage mix that you wanted. The dialer will halt calling if it can not maintain the percentage mix specified.

## Campaign Survey

The campaign survey section is used to configure Survey or Press-1 type campaigns. It should be noted that if you are calling consumers in the USA with this type of calling, that it will be illegal as of September 1, 2009 if you do not get expressed written consent from the consumers that you are calling in this way. For more information on this see the Regulations section of this manual.

Tutorial K goes over how to set up a Survey-type campaign. Here is an overview of all of the fields in the Survey section of the Campaign screen:

**Survey First Audio File** - This is the audio filename that is played as soon as the customer picks up the phone when running a survey campaign. If you want to have more than one audio prompt played to the customer, you can separate them with the pipe character. If Cepstral Text to Speech is installed on your system, then you can use a TTS prefix with a TTS ID that you have defined to have an audio file generated on the fly when a survey call is answered. You can also use a DYN prefix for this field to use lead field variables such as --A--province--B-- to refer to audio files that can be played. For both TTS and DYN playback capabilities, you must use one of the Cepstral campaign routing extensions like 8374 or 8375, even if you are not using Cepstral.

**Survey DTMF Digits** - This field is where you define the digits that a customer can press as an option on a survey campaign. valid DTMF digits are 0123456789\*#

**Survey Not Interested Digit** - This field is where you define the customer digit pressed that will show they are Not Interested.

**Survey Not Interested Status** - This field is where you select the status to be used for Not Interested. If DNC is used and the campaign is set to use DNC then the phone number will be automatically added to the Dialer internal DNC list and possibly the campaign-specific DNC list.

**Survey Wait Seconds** - the number of seconds (when in Survey mode) the system will wait, after the message, for input from the person called until the Survey No Response Action is triggered.

**Survey Opt-in Audio File** - This is the audio filename that is played when the customer has opted-in to the survey, not opted-out or not responded if the no-response-action is set to OPTOUT. After this audio file is played, the Survey Method action is taken. See the -Survey First Audio File- help for some more advanced options of what you can put into this field.

**Survey Not Interested Audio File** - This is the audio filename that is played when the customer has opted-out of the survey, not opted-in or not responded if the no-response-action is set to OPTIN. After this audio file is played, the call will be hung up. See the -Survey First Audio File- help for some more advanced options of what you can put into this field.

**Survey Method** - This option defines what happens to a call after the customer has opted-in. AGENT\_XFER will send the call to the next available agent. VOICEMAIL will send the call to the voicemail box that is specified in the Voicemail field. EXTENSION will send the customer to the extension defined in the Survey Xfer Extension field. HANGUP will hang up the customer. CAMPREC\_60\_WAV will send the customer to have a recording made with their response, this recording will be placed in a folder named as the campaign inside of the Survey Campaign Recording Directory. CALLMENU sends the customer to the Call Menu indicated in the “Survey Call Menu” field below.

**Survey No-Response Action** - This is where you define what will happen if there is no response to the survey question. OPTIN will only send the call on to the Survey Method if the customer presses a dtmf digit. OPTOUT will send the customer on to the Survey Method even if they do not press a dtmf digit. DROP will drop the call using the campaign drop method but still log the call as a PM played message status.

**Survey Response Digit Map** - This is the section where you can define a description to go with each DTMF digit option that the customer may select.

**Survey Xfer Extension** - If the Survey Method of EXTENSION is selected then the customer call would be directed to this dialplan extension.

**Survey Campaign Recording Directory** - If the Survey Method of CAMPREC\_60\_WAV is selected then the customer response will be recorded and placed in a directory named after the campaign inside of this directory.

**Survey Third Digit** - This allows for a third call path if the Third digit as defined in this field is pressed by the customer.

**Survey Fourth Digit** - This allows for a fourth call path if the Fourth digit as defined in this field is pressed by the customer.

**Survey Third Audio File** - This is the third audio file to be played upon the selection by the customer of the Third Digit option. See the -Survey First Audio File- help for some more advanced options of what you can put into this field.

**Survey Third Status** - This is the third status used for the call upon the selection by the customer of the Third Digit option.

**Survey Third Extension** - This is the third extension used for the call upon the selection by the customer of the Third Digit option. Default is 8300 which immediately hangs up the call after the Audio File message is played.

**Survey Call Menu** - If the method is set to CALLMENU, this is the Call Menu that the customer is sent to if they opt-in.

**Survey Recording** - If enabled, this will start recording when the call is answered. Only recommended if the method is not set to transfer to an agent. Default is N for disabled. If set to Y\_WITH\_AMD even

answering machine detected message calls will be recorded.

**List Order Mix** - Overrides the Lead Order and Dial Status fields. This feature uses the List and status parameters for the selected List Mix entry in the List Mix sub section instead. Default is DISABLED.

**List Mix ID** - ID of the list mix. Must be from 2-20 characters in length with no spaces or other special punctuation.

**List Mix Name** - Descriptive name of the list mix. Must be from 2-50 characters in length.

**List Mix Detail** - The composition of the List Mix entry. Contains the List ID, mix order, percentages and statuses that make up this List Mix. The percentages always have to add up to 100, and the lists all have to be active and set to the campaign for the order mix entry to be Activated.

**List Mix Method** - The method of mixing all of the parts of the List Mix Detail together. EVEN\_MIX will mix leads from each part interleaved with the other parts, like this 1,2,3,1,2,3,1,2,3. IN\_ORDER will put the leads in the order in which they are listed in the List Mix Detail screen 1,1,1,2,2,2,3,3,3. RANDOM will put them in RANDOM order 1,3,2,1,1,3,2,1,3. Default is IN\_ORDER.

## Agent Pause Codes

If the Campaign's Agent Pause Codes Active field is set to active then the agents will be able to select from these pause codes when they click on the PAUSE button on their screens. This data is then stored in the agent log. The Pause code must contain only letters and numbers and be less than 7 characters long. The pause code name can be no longer than 30 characters. The Time Limit field, if enabled in System Settings, will change the color of the agent on the Real-Time Report if they are in that pause code for more than the defined amount of seconds. The Mgr Approval field, if enabled, will require a manager to go to the agent screen and enter their login credentials to allow the agent to enter that pause code. Time Report if they are in that pause code for more than the defined amount of seconds. The Mgr Approval field, if enabled, will require a manager to go to the agent screen and enter their login credentials to allow the agent to enter that pause code. You can see statistics on Agent pause code time in the Agent Performance Detail report.

## Presets

This feature replaces the default "Transfer-Conf" fields in the campaign. Instead this enables an admin to create an almost unlimited menu of transfer/conference options for the agent. This feature is available once "Enable Transfer Presets" has been enabled in the campaign. Select the "Presets" link at the top to create the preset list of transfer and/or conference phone numbers. The menu allows for a Preset Name, the home number, and any additional DTMF code to follow. The number can also remain hidden from the agent. A "Presets" link appears at the bottom right corner of the agent's screen within the Transfer Conference frame(in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it shows all their available preset phone numbers. Selecting the entry from the list places it in the "Number to Call" field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact\_information is enabled on your system, and is a custom feature.

## AC-CID (Area Code Caller IDs)

Allows you the ability to set custom caller ID numbers per campaign for outbound calls by area code. You can even set multiple caller IDs per area code. Any calls placed from the campaign to leads in the indicated area code, will display the phone number in the “CID Number” field as their outbound call ID. To add an entry, indicate the area code to be called, the Outbound CID that should appear, a brief description, and click “submit”. This page also shows a list of all active AC-CIDs for this campaign.

## QC (Quality Control)

The Dialer Quality control module allows admins a process to easily review their agent's work and verify customer information. In advance, the administrators pre-select the specific campaigns and call statuses to audit. (See the “Quality Control” section of this manual for more details)

**QC Enable** - allows the feature to be implemented on the campaign.

**QC Statuses** - contains a complete list of statuses available in the campaign. Marking the checkbox indicates the statuses that will be audited. Once enabled, all leads marked with the indicated statuses are included in the Quality Control process.

**QC Statuses ID** - This area is where you select which "QC\_TEMPLATE" settings container will be used to determine the call statuses that are eligible for QC evaluation in this campaign.

**QC WebForm** - The designated website address the QC agent will be directed to when clicking on the WEBFORM link in the QC screen.

**QC Script** - This is the script that can be used by QC agents in the SCRIPT tab in the QC screen.

**QC Scorecard** - This is the scorecard to be shown to the agent when evaluating a QC record.

**QC Shift** - The shift timeframe used to pull QC records for a campaign. The days of the week are ignored for these functions.

**QC Get Record Launch** - Allows one of the following to be triggered upon a QC agent receiving a new record (SCRIPT, WEBFORM, QCSCRIPT, or QCWEBFORM).

**QC Show Recording** - Allows for a recording that may be linked with the QC record to be displayed in the QC agent screen

## Real-time Campaign Stats

From the Campaign Modification screen click the Real-time link at the top of the page, and you will see a real-time campaign screen that will show various statistics for the day like the number of dialable leads, leads in the hopper, dropped calls, etc... There are also more server-specific Real-time reports that will be mentioned later in this manual.

## Logout All Agents From a Campaign

This link at the bottom of the page allows you to immediately logout all agents from the campaign without them knowing, and will stop all sending of calls to agents (until they login again). Use this feature with caution. This does not properly log their logout time, and is for use only after a shift has ended and agents have forgotten to log out. It can also be used in case of an emergency where you must stop dialing on a campaign immediately.

## Delete Campaign

If the option is enabled, a manager can go to the bottom of a campaign modification record and click on the "DELETE THIS CAMPAIGN" link to remove a campaign from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS CAMPAIGN" link to remove the campaign from the system.

## Historical and Summary Campaign Reports

From the REPORTS tab of the administration web pages there are links to the VDAD OUTBOUND, CLOSER INBOUND and AGENT reports which all allow you to see summary data on the calling for a specific day for a specific campaign.

## Call Quota Lead Ranking

**THIS IS AN EXPERIMENTAL FEATURE, PLEASE READ ALL IMPORTANT NOTES!**

(If you plan on using this feature-set in production, you should read and understand everything in this section)

This document will go over the details of the new Call Quota Lead Ranking lead recycling features that were added to Dialer .

The purpose of this set of features is to allow for structured recycle dialing of leads where no contact is made over set time periods over a number of consecutive days. This feature set was built specifically for one client that has two main requirements:

- To be able to dial leads that do not connect to a customer at least 6 times over 2 concurrent days with at least one attempt made in each of 3 time periods during the day.
- To be able to automatically set an inactive list to active when the number of dialable NEW leads in the already active lists was about to be exhausted

While the feature-set that was built offers more flexibility than the requirements that were specified above, these were the parameters that we specifically tested to ensure this set of features was working properly.

### IMPORTANT DIALER VERSION NOTE!!!

You will need to be running Dialer svn/trunk revision 3125 or newer on all of the servers in your cluster in order to use these new features

## IMPORTANT FEATURE ENABLING NOTE!!!

To enable the Call Quota Lead Ranking feature set, you must enable it in:

"Admin -> System Settings -> Call Quota Lead Ranking"

and the "Call Quota Lead Ranking" campaign setting must also be set to a valid CALL\_QUOTA Settings Container for any campaigns that you want to use it on (more information on this below).

## IMPORTANT DATABASE LOAD NOTE!!!

This set of features may impact your database performance if you have a large number of leads in the lists of the campaigns that you enable this feature for. For this reason, we recommend putting lists that you are not dialing on today into a separate inactive campaign that does not have these features enabled on it.

### NOTE:

The Call Quota Lead Ranking features are not designed to work with standard campaign outbound Auto-Alt-Dialing. If you need to dial multiple numbers per account, please look into using the MULTI\_LEAD auto-alt-dialing option, which can work with these call quota features.

### NOTE:

We do not recommend using Call Quota Lead Ranking on the same statuses that you have enabled campaign Lead Recycling for. It is best not to use campaign Lead Recycling at all.

### NOTE:

We do not recommend resetting your Lists, or using the List "Reset Time" feature, while using Call Quota Lead Ranking on a campaign. The Call Quota Lead Ranking process has a component that automatically resets individual leads so they can be dialed again when they have their rank updated, if the rank is above 0.

### NOTE:

The lead ranking is performed on a per-lead-per-list basis, so if you move a lead to a different list, then the counts for the call quota lead ranking will be reset for that lead.

### NOTE:

The Call Quota logs per-lead that are needed for this process to work correctly are archived after 7 days, so all Call Quota Lead Ranking recycling operations for a lead need to be set for 7 days or less.

### NOTE:

If Call Quota Lead Ranking is enabled on a campaign, then the campaign's "List Order" setting will be overridden by the Call Quota Settings Container settings.

## How the "Auto Active List New" feature works:

This feature will automatically set an inactive list to active when it contains dialable NEW status leads and the campaign has less than this setting's number of NEW status leads to be dialed. The order in which the next list is set to active is determined by the Lists' Auto Active List Rank. This feature will only work if there has been calling on this campaign within the last hour. If no leads have been dialed within the last hour in this campaign, then this feature will not function. The default campaign setting for this feature is DISABLED.

## How the "Call Quota Lead Ranking" feature works:

This feature works on a per-campaign basis, the campaign setting will allow you to choose a Settings Container which has the settings you want to use for Call Quota Lead Ranking(see the example setting container below)

### Example Settings Container Entry:

```
redial_statuses => A,N,NA,VM,NSC,DROP,PDROP
total_goal => 6
daily_goal => 3
daily_max => 5
session_goal => 2
session_day_max => 2
new_shuffle => 3
min_consecutive_days => 2
active_days_of_week => 0123456
zero_rank_after_call => 1
call_quota_run_time => 01,31
session_one => 0800,1200
session_two => 1200,1600
session_three => 1600,2000
session_four =>
session_five =>
session_six =>
```

For the Call Quota Settings Container to be valid, the first 11 core settings listed above must be set to valid values, see below:

- redial\_statuses: a comma-delimited list of the statuses that you want to recycle-dial  
NOTE: Make sure you have these statuses also set as campaign dial statuses
- total\_goal: must be set to a number from 1 to 100, goal total number of calls during min\_consecutive\_days, since this is a "goal" the called count can go over this number
- daily\_goal: must be set to a number from 1 to 20, goal number of calls per day, since this is a "goal" the called count can go over this number
- daily\_max: must be set to a number from 1 to 20, maximum number of calls per day, leads that hit this count will have rank set < 0  
NOTE: See note in the "TIPS & SUGGESTIONS" section about adding a filter to

prevent these leads from being dialed any more

- session\_goal: must be set to a number from 1 to 20, goal number of calls during session, total across all days

- session\_day\_max: must be set to a number from 1 to 20, maximum number of calls during each session for current day, leads that hit this count will have rank set < 0

NOTE: See note in the "TIPS & SUGGESTIONS" section about adding a filter to prevent these leads from being dialed any more

- new\_shuffle: must be set to a number from 0 to 6, 0 is no NEW lead shuffle, '1' is assumed to be '2' for every-other lead

- min\_consecutive\_days: must be set to a number from 1 to 7, this is the number of days allowed to reach the "total\_goal"

- active\_days\_of\_week: must be from one to seven digits, one for each day of the week, Sunday=0, example: "0123456" for all 7 days of the week

- zero\_rank\_after\_call: set to 0 or 1, if set to 1, the lead's rank will be set to 0 when the call is completed, if the lead's rank is above 0

- call\_quota\_run\_time: a comma-delimited list of the "minutes" of each hour when the call quota lead ranking process is to be run, once an hour, "01", is usually fine.

NOTE: If you are using Call Quotas on multiple campaigns, we recommend you schedule their run times to not overlap

#### NOTES:

There are also up to 6 sessions that can be defined, they all follow the same format and must be put in chronological order.

All times are based on server time, not the customer time.

It is assumed that the session times will cover all possible dialing times for the campaign.

For the 'day X of dialing' determination, the "System Settings -> Timeclock End of Day" setting is used to determine when each day begins

You must define at least one session.

Sessions are not designed to start earlier than "0000", or go past "2400".

4-digit starting time(in 24 hour format with zero-padding), 4-digit ending time(in 24 hour format with zero-padding)

#### **TIPS & SUGGESTIONS FOR USING CALL QUOTA LEAD RANKING:**

- Set the campaign's hopper level to the number of leads your campaign dials in 1-3 minutes, so that the updated rankings will be most effective, especially at session time boundaries

- Deactivate lists after all leads have been called your desired amount of times. You can see that by looking at the data table on the List Modify page at the bottom

- Set your call quota sessions to be similar lengths of time, and make sure all of your calling hours are covered by your sessions



- Do not change your "sessions" after you have activated Call Quotas on your campaign
- Keep less than 400,000 leads in the lists of a single campaign. Move your unused lists to an inactive campaign
- Since there can sometimes be rare inconsistencies in how the multiple call logging processes work, you may have a call-quota log entry for a lead that shows a status different from the lead's current status. For instance, one may show "AB" while the other may show "B" for a busy number. You should include all possible statuses you want to re-dial in your "redial\_statuses" setting.
- When you start a brand-new campaign, you will have to dial only NEW leads, but after the first day, you should remove NEW from your campaign dialing statuses and use the Call Quota "new\_shuffle" setting to shuffle in NEW leads instead. As your campaign progresses, you should be able to change new\_shuffle from 2 down to 4, 5 or 6.
- To ensure that leads with a negative rank are not called, you may want to create a Filter in the system with a Filter SQL of "(rank > 0)" and enable it for your campaign. This will help to ensure that unranked leads are not dialed. If you insert NEW leads with no rank, you will want to change this to use "(rank >= 0)".

## INSTRUCTIONS AND NOTES FOR SYSTEM ADMINISTRATORS:

1. To populate the Call Quota logs for a campaign that has been placing outbound calls but is just now having Call Quotas enabled on it. This needs to be run manually from one of the dialers like this:

```
/usr/share/astguiclient/AST_VDcall_quotas.pl --debugX --populate-call-quota-logs --campaign=TESTCAMP
```

2. To perform the ranking of leads within the campaigns where Call Quotas are being used. This is run automatically at least once an hour(as defined in the "call\_quota\_run\_time" Settings Container specified for the campaign) by the system at set intervals on the "Active Voicemail Server" as defined in "System Settings"

The Campaign Debug report(accessible to level 9 users by going to "Reports -> Admin Utilities") will show you debug output from the last time the AST\_VDcall\_quotas.pl process ran for the campaign at the bottom of the page. Example output:

Call Quota Lead Ranking Debug: 2019-07-18 09:36:54

```
TESTCAMP CAMPAIGN ACTIVE DIALABLE NEW LEADS COUNT: 17588
TESTCAMP CAMPAIGN LISTS RECENTLY DIALED COUNT: 2
TESTCAMP CAMPAIGN LEAD RANK UPDATES: 10756
TESTCAMP CAMPAIGN LEAD CALLED RESET UPDATES: 3639 (19128)
LIST CACHE STATS UPDATED: 99899 TOTAL: 60000 NEW: 17581 DIALABLE NEW: 17581 LIST CACHE
STATS UPDATED: 107 TOTAL: 59904 NEW: 7 DIALABLE NEW: 7
LIST CACHE STATS UPDATED: 222 TOTAL: 1 NEW: 1 DIALABLE NEW: 1
LIST CACHE STATS UPDATED: 303 TOTAL: 1 NEW: 1 DIALABLE NEW: 1
LIST CACHE STATS UPDATED: 888 TOTAL: 5 NEW: 5 DIALABLE NEW: 5
LIST CACHE STATS UPDATED: 929 TOTAL: 0 NEW: 0 DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 992 TOTAL: 10 NEW: 0 DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 998 TOTAL: 101 NEW: 23 DIALABLE NEW: 8
LIST CACHE STATS UPDATED: 1101 TOTAL: 761 NEW: 761 DIALABLE NEW: 761
LIST CACHE STATS UPDATED: 10000 TOTAL: 0 NEW: 0 DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 10001 TOTAL: 14 NEW: 14 DIALABLE NEW: 14
```

```

LIST CACHE STATS UPDATED: 10002    TOTAL: 7    NEW: 7    DIALABLE NEW: 7
LIST CACHE STATS UPDATED: 10003    TOTAL: 0    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 10004    TOTAL: 0    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 11091    TOTAL: 10   NEW: 10   DIALABLE NEW: 10
LIST CACHE STATS UPDATED: 89106    TOTAL: 13   NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 223344    TOTAL: 7    NEW: 3    DIALABLE NEW: 3
LIST CACHE STATS UPDATED: 334455    TOTAL: 1    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 373737    TOTAL: 0    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 999888    TOTAL: 6104 NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 3333301   TOTAL: 15   NEW: 14   DIALABLE NEW: 14
LIST CACHE STATS UPDATED: 3333302   TOTAL: 42   NEW: 42   DIALABLE NEW: 42
LIST CACHE STATS UPDATED: 3333304   TOTAL: 0    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 12345678   TOTAL: 3    NEW: 0    DIALABLE NEW: 0
LIST CACHE STATS UPDATED: 100000010  TOTAL: 60000 NEW: 59999 DIALABLE NEW: 59999
LIST CACHE STATS UPDATED: 100000011  TOTAL: 60000 NEW: 59995 DIALABLE NEW: 59995
LIST CACHE STATS UPDATED: 999888999777 TOTAL: 0    NEW: 0    DIALABLE NEW: 0
Call Quota run time: 56 seconds

```

A new outbound auto-dial log-auditing function has also been added to the AST\_VDadapt.pl script when Call Quotas is enabled. This function validates logs and fixes them if logging at the end of a call does not happen in the way it is supposed to, which can happen on overloaded systems.

## Shared-Agent Campaign Dialing

In cases where a company wants the same group of agents to be able to outbound auto-dial on more than one campaign, you can configure your system to be able to operate in this way. Although it will often lead to a higher total dropped call rate than using separated campaigns or using separate lists within the same campaign and the list override settings to achieve unique configurations per list.

First, a description of how to use List Overrides on multiple lists in a single campaign to achieve the goals of most of our clients that initially say they want to run multiple campaigns for the same group of agents. In the List Modification screen, you will see a series of settings that allow you to override campaign settings for calls placed from that list. For example, all of the following settings can be overridden at the list level:

- Agent Script Override
- Inbound Script Override
- Inbound Drop Voicemail Override
- Inbound After Hours Voicemail Override
- Campaign CID Override
- Answering Machine Message Override
- Drop Inbound Group Override
- Status Group Override
- Web Form
- Web Form Two
- Web Form Three
- No Agent Call URL
- Transfer-Conf Number 1 Override
- Transfer-Conf Number 2 Override
- Transfer-Conf Number 3 Override
- Transfer-Conf Number 4 Override
- Transfer-Conf Number 5 Override
- Default Transfer Group

The above settings will allow calls to go out and back in with unique settings, allowing for unique calls paths and agent screens for each list. So if you have a set of services to perform on a customer list, you can define one per list and have the same group of agents call on all of those separate lists all in one single campaign.

In some cases, like different agent spoken language skills, the above approach will not work, so you have to set up different campaigns(and lists) for each spoken language. In the example below we will detail each of the settings that need to be configured in Campaigns and In-Groups for this to work. We will use the example of an outbound appointment confirmation program that calls people who speak both English and Spanish and have agents who speak one or both of those languages. **(There is also a newer and more efficient option for Shared Agent Multi-Campaign outbound dialing using the "SHARED\_" Dial Methods that you can read about below this section.)**

NOTE: The following instructions below assume that you already know how to set up and run an outbound auto-dialing campaign.

1. Set up three campaigns:

- APPTENG(Appointments English)
- APPTSPA(Appointments Spanish)
- APPTAGNT(Appointments All Agents)

2. Set up two lists:

- 1101(Appointments English List), assigned to the APPTENG campaign
- 1102(Appointments Spanish List), assigned to the APPTSPA campaign

3. Set up two Inbound Groups to use as Drop In-Groups:

- DROP\_APPT\_ENG(Appointments English Drop InGroup)
- DROP\_APPT\_SPA(Appointments Spanish Drop InGroup)

\* RECOMMENDATIONS:

- You may want to set the In-Group "Drop Call Seconds" to a lower number and send the call to a Call Menu if no agent is available

4. Set the following settings on both the APPTENG & APPTSPA campaigns (these are your two outbound dialing campaigns)

\* Start by setting these campaigns up as you would to be normal outbound auto-dialing campaigns

Dial Method: ADAPT\_AVERAGE or RATIO

Available Only Tally: Y

Drop Call Seconds: -1

Drop Action: IN\_GROUP

Drop Transfer Group: DROP\_APPT\_ENG(for the APPTENG campaign) or

DROP\_APPT\_SPA(for the APPTSPA campaign)

\* RECOMMENDATIONS:

- You may want to enable "Available Only Tally" or "Available Only Tally Threshold" to reduce the drop levels on these campaigns

- Depending on the number of agents, you may want to set "Dial Level Difference Target" to a negative number to reduce drops

- For high-contact lists, you should use a RATIO dial method and a Dial Level of '1'

5. Set the following settings on the APPTAGNT campaign:

Allow Inbound and Blended: Y

Dial Method: RATIO

Allow No-Hopper-Leads Logins: Y

Allowed Inbound Groups: select both "DROP\_APPT\_ENG" & "DROP\_APPT\_SPA"

\* Do not assign any active lists to this campaign

6. Set the following settings on both the DROP\_APPT\_ENG & DROP\_APPT\_SPA inbound groups

Welcome Message Filename: ---NONE---

Play Welcome Message: NEVER

No Delay Call Route: Y

7. Set up two Users(which will be used for Remote Agents)

User Number: 900000 & 910000

8. Set up two Remote Agents

User ID Start: 900000 & 910000

Number of Lines: 1

Server IP: <set to an active dialer with agents on your system>

NOTE: On a multi-dialer cluster with multiple outbound campaigns, you will want to spread out Remote Agents across your active dialers

External Extension: 8300

Status: ACTIVE <You may want to leave this as INACTIVE until you are ready to dial>

Campaign: assign one to the APPTENG campaign and the other to the APPTSPA campaign

9. All agents will log into the "APPTAGNT" campaign and will select the "DROP\_APPT\_ENG" and/or "DROP\_APPT\_SPA" in-groups to take calls from when they log in, or managers can select those in-groups for the agents in the User Modify screen for those agents if they don't want their agents to have the ability to choose.

## **HOW IT WORKS:**

When an outbound dialing campaign has the "Drop Call Seconds" set to '-1' and the "Drop Action" set to 'IN\_GROUP' then the predictive dialing system will look for active agents logged in to other campaigns that have selected that campaign's "Drop Transfer Group" and will count them as agents in the outbound campaign, for the purposes of calculating how many calls to place outbound. For this reason, we recommend enabling the campaign "Available Only Tally" settings, to ensure too many calls are not being placed for agents already in phone calls since any agent with more than one campaign "drop in-group" selected will appear as more than one agent to the dialing system. The Remote Agents are used as a way of telling the system that the outbound dialing campaigns should be active, and when the "Drop Call Seconds" set to '-1' and the "Drop Action" set to 'IN\_GROUP' then the first remote agent entry will be ignored for a campaign when the system calculates how many calls to place outbound.

When "Drop Call Seconds" set to '-1' in a campaign, and a call is answered by a customer, the system will not even look for an agent in that campaign to send a call to, it will immediately drop the call to the selected drop in-group. With the In-Group "No Delay Call Route" set to 'Y', the system will attempt to send the call to an agent as fast as possible.

## **THE PROBLEM OF "OVER-DIALING":**

When you allow a single agent to have multiple calls placed for them, there can always be a problem with "over-dialing", even when only using a single campaign. This issue is more complicated though

when that same level of dialing is happening across multiple campaigns. At a minimum, the campaign "Available Only Tally" settings should be the first things you check to see if they are active. Beyond that, there really are not any simple solutions for it. Because of this, we added a new campaign feature, detailed below.

We have added a new campaign dialing method "SHARED\_..." that is specifically for shared agent campaigns that will operate somewhat like a round-robin system for shared agent campaign dialing. For instance, if only one agent is logged-in with dialing happening for that agent across 3 campaigns, each of those 3 campaigns would take turns dialing for that one agent. The number of calls would be calculated based on the number of agents that could take calls from each campaign, and the number of campaigns each agent is set to take calls from. This was a very complex project to complete, but it is the most efficient option with the best possibility for a balance between keeping agents on the phone and not dropping calls under all conditions(even single-agent dialing).

**The following are instructions for how to set up a "SHARED\_" set of campaigns:**

1. Set up three campaigns:
  - SHIPENG(Shipping English)
  - SHIPFRE(Shipping French)
  - SHIPAGNT(Shipping All Agents)
2. Set up two lists:
  - 1201(Shipping English List), assigned to the SHIPENG campaign
  - 1202(Shipping French List), assigned to the SHIPFRE campaign
3. Set up two Inbound Groups to use as Drop In-Groups:
  - DROP\_SHIP\_ENG(Shipping English Drop InGroup)
  - DROP\_SHIP\_FRE(Shipping French Drop InGroup)
  - \* RECOMMENDATIONS:
    - You may want to set the In-Group "Drop Call Seconds" to a lower number and send the call to a Call Menu if no agent is available
4. Set the following settings on both the SHIPENG & SHIPFRE campaigns (these are your two outbound dialing campaigns)
  - \* Start by setting these campaigns up as you would to be normal outbound auto-dialing campaigns
  - Dial Method: SHARED\_ADAPT\_AVERAGE or SHARED\_RATIO
  - Available Only Tally: Y
  - Drop Call Seconds: -1
  - Drop Action: IN\_GROUP
  - Drop Transfer Group: DROP\_SHIP\_ENG(for the SHIPENG campaign) or DROP\_SHIP\_FRE(for the SHIPFRE campaign)
5. Set the following settings on the SHIPAGNT campaign:
  - Allow Inbound and Blended: Y
  - Dial Method: RATIO
  - Allow No-Hopper-Leads Logins: Y
  - Allowed Inbound Groups: select both "DROP\_SHIP\_ENG" & "DROP\_SHIP\_FRE"
  - \* Do not assign any active lists to this campaign
6. Set the following settings on both the DROP\_SHIP\_ENG & DROP\_SHIP\_FRE inbound groups
  - Welcome Message Filename: ---NONE---

Play Welcome Message: NEVER  
No Delay Call Route: Y

7. All agents will log into the "SHIPAGNT" campaign and will select the "DROP\_SHIP\_ENG" and/or "DROP\_SHIP\_FRE" in-groups to take calls from as well as selecting the "BLENDED CALLING" checkbox when they log in, or managers can select those in-groups and the "Closer Default Blended" for the agents in the User Modify screen for those agents if they don't want their agents to have the ability to choose.

\* NOTES:

- The "SHARED\_..." campaign dial method does not require the use of Remote Agents at all, and the live agents do need to select to take blended (outbound) calls or no calls will be placed for them as they rotate through the shared agent campaigns.

- For SHARED agent campaigns, there is an additional campaign setting: "Shared Dial Rank", which will allow you to prioritize the dialing of your shared campaigns as calls are placed for them.

## **SIP Event Logging**

**THIS IS AN EXPERIMENTAL FEATURE, PLEASE READ ALL IMPORTANT NOTES!**

This section is mostly for system administrators, and will go over the details of the new SIP event logging features that were added to Dialer for use with newer VICI-patched versions of Asterisk 13

The purpose of this SIP event logging is to hopefully help to be able to better identify FAS(False Answer Supervision) and PDD(Post Dial Delay), as well as manual dial call progress updates to the agent.

For phase 1 of this project, the basic framework of logging the SIP messages on all outbound calls is complete, as well as extended logging of answered calls. The maintenance of all involved new database log tables is also complete.

For phase 2 of this project, we added some basic reporting(AST\_SIP\_event\_report.php available in Admin Utilities) which can show the summary details of every Answered call on the system with pop-up displays for all of the SIP events that happened on each call as well as a link to the Modify Lead page where you can also see the SIP events for every call to that lead(the SIP events are only stored for 7 days).

For phase 3 of this project, we added the new campaign "SIP Event Actions" settings, which will allow you to define specific actions to happen depending on what is in the SIP Event Log for each call. Initially this feature will only affect manual dial agent screen calls, for example, allowing you to automatically hang up manual dial calls that take less than one second from the dial event to the answer. See the "Campaign SIP Event Actions" section below for more information.

For phase 3 of this project, we added the ability to log to dialer \_sip\_action\_log table. Also added auto-dial call SIP Action execution.

**IMPORTANT DIALER VERSION NOTE!!!**

You will need to be running Dialer svn/trunk revision 3108 or newer on all of the servers in your cluster in order to use these new features

### IMPORTANT DATABASE SOFTWARE NOTE!!!

This new set of features is going to require database software from 2012 or newer, either MySQL 5.6(or higher) or MariaDB 5.3(or higher). That's when "microseconds" support was added in each. This is used for "DATETIME(6)" database fields that can store high-precision dates like so: "2019-05-30 15:29:22.374172".

Current Dialer code requires only MySQL 5.1+(from 2005).

For more details:

<https://dev.mysql.com/doc/refman/5.6/en/fractional-seconds.html>

<https://mariadb.com/kb/en/library/microseconds-in-mariadb/>

### IMPORTANT ASTERISK 13 PATCH NOTE!!!

This set of features requires a patch to Asterisk 13. It is included in the Dialer codebase here: "extras/sip\_logging.patch". An already-patched version of Asterisk 13.29.2 is available for VICIbox 8 and 9, or through the OpenSuSE OBS which VICIbox uses.

### IMPORTANT ASTERISK 13 CONF FILE NOTE!!!

You will need to add lines to the /etc/asterisk/manager.conf file to allow for the new SIP messages to arrive from Asterisk:

# to see a complete version of this file, look at the "docs/conf\_examples/manager.conf.sample-13" file

# At the top(in the [general] section below "bindaddr = 0.0.0.0"):

```
timestampevents = yes
```

# At the bottom of the file, add:

```
[sipcron]
secret = 1234
read = call
write = command
eventfilter=Event: SIPInvite
eventfilter=Event: SIPResponse
```

### IMPORTANT FEATURE ENABLING NOTE!!!

To enable the SIP event logging listener script, you will need to add 'S' to the "VARactive\_keepalives" line in "/etc/astguiclient.conf" file on each dialer that you want these new features to be activated on.

You will also need to enable this feature in Admin -> System Settings

## Campaign SIP Event Actions:

This is designed to be a set of features that will allow for flexible configuration of different actions that are to be taken on calls based upon their SIP event logs.

The first action of this feature to be enabled is the ability to set agent screen manual dial calls and auto-dialed calls to be hung up if certain criteria are met, for example, less than 1 second from dial to answer.

The second action to be enabled is the ability to log to a special dialer `_sip_action_log` table when certain criteria are met.

This set of features is configured using a Settings Container of the "SIP\_EVENT\_ACTIONS" type, which you define in the Campaign Detail screen "SIP Event Actions" setting.

### Example SIP\_EVENT\_ACTIONS Settings Container:

```
; agent screen actions
AGENT_SCREEN_ACTIONS_START
invite_to_final => 0.0,1.2,hangup-dispo-message-logtable,FAS,Auto Hangup and Dispo of False Answer Call,auto-only
invite_to_final => 0.0,0.1,hangup-dispo-message-logtable,FAS,Auto Hangup and Dispo of False Answer Call>manual-only
AGENT_SCREEN_ACTIONS_FINISH
```

### Settings within agent screen actions:

1. time range start - a number with 1-6 decimal places
2. time range finish - a number with 1-6 decimal places
3. agent screen action taken - any combination of the following: 'hangup', 'dispo', 'message', 'logtable' separated by dashes
4. If 'dispo' is included in #3, then this is the dispo set. If 'logtable' is used, then this is the result logged
5. If 'message' is included in #3, then this is the message sent to the agent
6. Define if the action is for 'both', 'auto-only' or 'manual-only'. Default or blank is 'both'

If you include a message, it will be displayed on the agent's screen for 4 seconds then it will automatically disappear.

If you use 'logtable', a record will be inserted into the dialer `_sip_action_log` table.

For auto-dialed calls, if 'hangup' is used, then 'dispo' will be assumed, even if not defined



ADMINISTRATION										
LIST LISTINGS: <a href="#">hide list leads counts</a> <a href="#">hide inactive lists</a>										
LIST ID	LIST NAME	DESCRIPTION	RTIME	LEADS COUNT	CALL TIME	ACTIVE	LAST CALL DATE	CAMPAIGN	MODIFY	
100	Mike Test			674647	campaign	N	2020-04-03 16:32:22	MIKTEST	<a href="#">MODIFY</a>	
105	test list 105			13	campaign	N	2020-03-30 01:45:18	ALTTEST	<a href="#">MODIFY</a>	
106	test list 106			77	campaign	N		ALTTEST	<a href="#">MODIFY</a>	
107	performance list			59863	campaign	Y	2020-04-09 15:22:38	TESTCAMP	<a href="#">MODIFY</a>	
123	test			1	campaign	Y	2020-04-06 11:08:56	ALTTEST	<a href="#">MODIFY</a>	
129	test list 129			14	campaign	N		ALTTEST	<a href="#">MODIFY</a>	
177	second list			6118	campaign	Y	2020-04-09 13:42:34	ALTTEST	<a href="#">MODIFY</a>	
8199	test list 8199			6	campaign	N	2020-01-07 17:20:45	TESTCAMP	<a href="#">MODIFY</a>	
9988	API insert name 1	API insert description 2		14	campaign	N		ALTTEST	<a href="#">MODIFY</a>	
11113	Mike Test			68	campaign	N	2020-01-09 16:06:02	MIKTEST	<a href="#">MODIFY</a>	
82106	second test list - dispo			132	campaign	N	2020-04-09 15:23:31	TESTCAMP	<a href="#">MODIFY</a>	
2019010901333333	test			0	campaign	N		ALTTEST	<a href="#">MODIFY</a>	
999887	test list			0	campaign	N EXP		TEST3	<a href="#">MODIFY</a>	
999886	test list			0	campaign	N		TEST4	<a href="#">MODIFY</a>	
999885	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	
999884	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	
999883	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	
999882	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	
999881	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	
999880	test list			0	campaign	N		TEST3	<a href="#">MODIFY</a>	

Figure 5. Lists List

## Dialer LISTS

When you click on the LISTS link on the left side of the admin screen you will enter the Lists section. This starts with a full listing of every Dialer list in the system with their list ID, name, campaign that they are associated with, active status and a link to the list modification page. If you want to see a count of the number of leads in each list, just click on the “show list leads counts” link at the top of the lists table. We will first look at adding a new list.

NOTE: if you see a red “EXP” in the ACTIVE column, that means that the list has reached its Expiration Date and will not be dialed. If you see the campaign in red, then the campaign that specific list is assigned to has been deleted.

## Add a New List

You can get to the Add List screen by clicking on the "ADD NEW LIST" link at the top of the LISTS section. When adding a new list you must make sure that you set the list ID and list name or the submission will not be accepted. Also, please make sure that the list ID you have chosen does not have any spaces, punctuation or letters, only numbers. Also, the List ID cannot start with a '0'. Once you create a list you will not be able to change that list ID unless you delete the list and re-create it again with a different list ID. You cannot have duplicate list IDs in the system, and list IDs must be between 3 and 8 characters in length.

## Modify Lists

*(screen shot of the Modify List screen available in the Appendix)*

**List ID** - This is the numerical name of the list, it cannot be edited after initial submission, must contain only numbers and must be between 3 and 8 characters in length. The List ID must be greater than 99 and cannot start with a '0'.

**List Name** - This is the description of the list, it must be between 2 and 20 characters in length.

**List Description** - This is the memo field for the list. It is optional.

**Campaign** - This is the campaign that this list belongs to. A list can only be dialed on a single campaign at one time. If you change the campaign that this list is assigned to, all of the leads in the hopper currently will be removed to ensure no duplication of calling.

**Active** - This defines whether the list is able to be dialed on or not.

**Reset Lead-Called-Status for this list** - This resets all leads in this list to N for "not called since last reset" and means that any lead can now be called if it is the right status as defined in the campaign screen. After you call through a list once, you need to reset the list before those leads can be called again.

**Reset Times** - This field allows you to put times in, separated by a dash-, that this list will be automatically reset by the system. The times must be in 24 hour format with no punctuation, for example 0800-1700 would reset the list at 8AM and 5PM every day. Default is empty.

**Daily Reset Limit** - This setting is only editable by a level 9 user. This setting allows an Administrator to limit the number of times that a list can be reset per day. The Resets Today number is counted from the Timeclock End Of Day time that is set in the system. Default is -1 for disabled.

**Expiration Date** - This option allows you to set the date after which leads in this list will not be allowed to be auto-dialed or manual-list-dialed by the system. Default is 2099-12-31 (Dec 31<sup>st</sup>, 2099).

**Local Call Time** - This is a setting for this list only, where you set during which hours you would like to dial leads within this specific list, as determined by the local time in the area in which you are calling. This is controlled by the time zone, as defined by that list setting, and is adjusted for Daylight Savings time if applicable. However, state rules are based on the state field for the lead and not only the time zone that is set. This call time setting is applied after the campaign local call time has been applied to the list and will NOT override the campaign settings. This setting will only narrow down call times in relation to the campaign local call time setting. It will NOT allow calling outside the hours set by the campaign local call time setting. This is useful if you have lists that need different call times within the same campaign. For example calling business numbers between 9am to 5pm and consumer phones between 9am to 9pm within the same campaign. General Guidelines in the USA for Business to Business is 9am to 5pm and Business to Consumer calls is 9am to 9pm. Default is campaign. In general, we do not recommend using this option on all lists. You should only use this option if you really need to, since it can add significant load to your system.

**Audit Comments** - This option allows comments to be moved to an audit table. No longer editable, but viewable along with the date-time-creator of each comment. Default is N. This is a part of the Quality

Control system.

**List Change Date** - This is the last time that the settings for this list were modified.

**List Last Call Date** - This is the last time that a lead was dialed from this list.

**Agent Script Override** - If this field is set, this will be the script that the agent sees on their screen instead of the campaign selected script or in-group selected script when the lead is from this list. Default is not set.

**QC Scorecard Override** - This is the scorecard to be shown to the agent when evaluating a QC record. It will override any campaign setting, but ingroup QC settings still take top priority.

**QC WebForm Address** - This is the website address that a QC agent can go to when clicking on the WEBFORM link in the QC screen.

**QC Statures ID** - This area is where you select which "QC\_TEMPLATE" settings container will be used to determine the call statuses that are eligible for QC evaluation in this list. This will override the campaign's "QC Statures ID" setting if it is set, but not ingroups.

**Inbound Script Override** - If this field is set, this will be the script that the agent sees on their screen instead of the campaign script when the agent receives an inbound call and the lead is from this list. Default is not set.

**Inbound Drop Voicemail Override** - If an inbound call associated with this list drops while in an Inbound Group queue, this is the voicemail box the call will be sent to if the Drop Action is set to go to a voicemail box.

**Inbound After Hours Voicemail Override** - If an inbound call associated with this list triggers an after hours action after it has been sent to an Inbound Group queue, this is the voicemail box the call will be sent to if the After Hours Action is set to go to a voicemail box.

**Campaign CID Override** - If this field is set, this will replace the campaign caller ID that is set for calls that are placed to leads in this list. Default is not set.

**Campaign CID Group Override** - If this option is set to a valid CID Group in the system, this will override all campaign CallerID Number settings for calls placed to leads within this list. Default is ---DISABLED---

**Answering Machine Message Override** - If this field is set, this will override the Answering Machine Message set in the campaign for customers in this list. Default is not set.

**Drop Inbound Group Override** - If this field is set, this in-group will be used for outbound calls within this list that drop from the outbound campaign instead of the drop in-group set in the campaign detail screen. Default is not set.

**Status Group Override** - If this field is set, this Status Group will be used instead of the campaign statuses for calls handled by agents from this list. This does not affect System Statures which will

always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Web Form & Web Form Two/Three-** These fields will override the respective fields on the attached campaign.

**No Agent Call URL** -This web URL address is not seen by the agent, but if it is populated it is called every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. --A--dispo--B-- can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank. Custom Fields are not available with this feature. If you put ALT into this field and submit this form, you will be able to go to a separate page where you can define multiple URLs for this action as well as specific statuses that will trigger them.

**Auto Alt Threshold Override** - If Auto Alt-Number Dialing is enabled, and not set to MULTI\_LEAD, then this setting will specify the number of call attempts to the lead after which the Auto Alt dialing will no longer place alternate number calls for a specific lead, if the lead is called after this number of attempts then only the main phone number will be called. This option overrides the campaign setting for this feature. Default is -1 for the override being disabled.

**Dial Prefix Override** - This setting will override the campaign Dial Prefix, the campaign Manual Dial Prefix and API dial prefix for calls placed in that campaign to leads within this list. Default is -blank- for disabled.

**Xfer-Conf Number Override** - These five fields allow for you to override the Transfer Conference number presets when the lead is from this list. Default is blank.

**User New Lead Limit** -This setting will limit the number of new leads any user can dial in this list per day. This feature will only work properly if the campaign is set to either the MANUAL or INBOUND\_MAN Dial Method and No Hopper dialing is enabled. Default is -1 for disabled. There is a link directly below this field to a page where you can modify all of the User New Lead Limit settings for this list.

**Auto Active List Rank** - If the Auto Active List New setting is enabled for this campaign, then this is the order in which inactive lists will be set to active as each list runs out of NEW status leads to dial. The order is from highest number to the lowest. Default is 0.

**Inventory Report** - If the Inventory Report is enabled on your system, this option will determine whether this list is included in the report or not. Default is Y for yes.

**Time Zone Setting** - This option allows you to set the method of maintaining the current time zone lookup for the leads within this list. This process is only done at night so any changes you make will not be immediate. COUNTRY\_AND\_AREA\_CODE is the default, and will use the country code and area code of the phone number to determine the time zone of the lead. POSTAL\_CODE will use the postal code if available to determine the time zone of the lead. NANPA\_PREFIX works only in the USA and will use the area code and prefix of the phone number to determine the time zone of the lead, but this is not enabled by default in the system, so please be sure you have the NANPA prefix data loaded onto your system before selecting this option. OWNER\_TIME\_ZONE\_CODE will use the

standard time zone abbreviation loaded into the owner field of the lead to determine the time zone, in the USA examples are AST, EST, CST, MST, PST, AKST, HST. This feature must be enabled by your system administrator to go into effect.

## List Statistics

On the list modification page you will see 3 different set of statistics breaking down the types of leads inside of the list. The first set of stats is a simple breakdown of the disposition status of the leads in the list and how many of each disposition have been called and have not been called. In addition the report shows Dialable and Penetration. Dialable is determined if lead the status is not flagged as UNWORKABLE or COMPLETED. While Penetration represents the percentage of leads that have either been dialed equal to the Call Count Target set in the campaign, or if the disposition has been flagged as DNC, NOT INTERESTED, UNWORKABLE, COMPLETED. The second set of stats is a breakdown of leads by timezone and whether they have been called or not. The third shows which User have been assigned as the Owner of a lead (if any) and total number of leads they own. The fourth displays the Ranks assigned to the leads and the total number of leads for each Rank. If Rank has not been assigned the leads will be listed as Rank "0". The final set of stats is a table that breaks down the leads into both their status and how many times they have been called.

## Delete List

If the option is enabled, a manager can go to the bottom of the list modification page and click on the "DELETE THIS LIST" link to remove a list from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS LIST" link to remove the list from the system. This step will also delete any leads in the system within that list.

## Search For a Lead

*(screen shot of the Modify List screen available in the Appendix)*

You can search for a lead by clicking on the "SEARCH FOR A LEAD" link at the top of the LISTS section. This screen simply allows you to search for a lead based upon a phone number, alternate phone number, user ID, the vendor lead code, system lead ID, lead status, list ID, owner, or the customer's first & last name. If leads are found you will see a summary of the leads information as well as a link to modify the leads and a link to do a new lead search.

## Add a New Lead

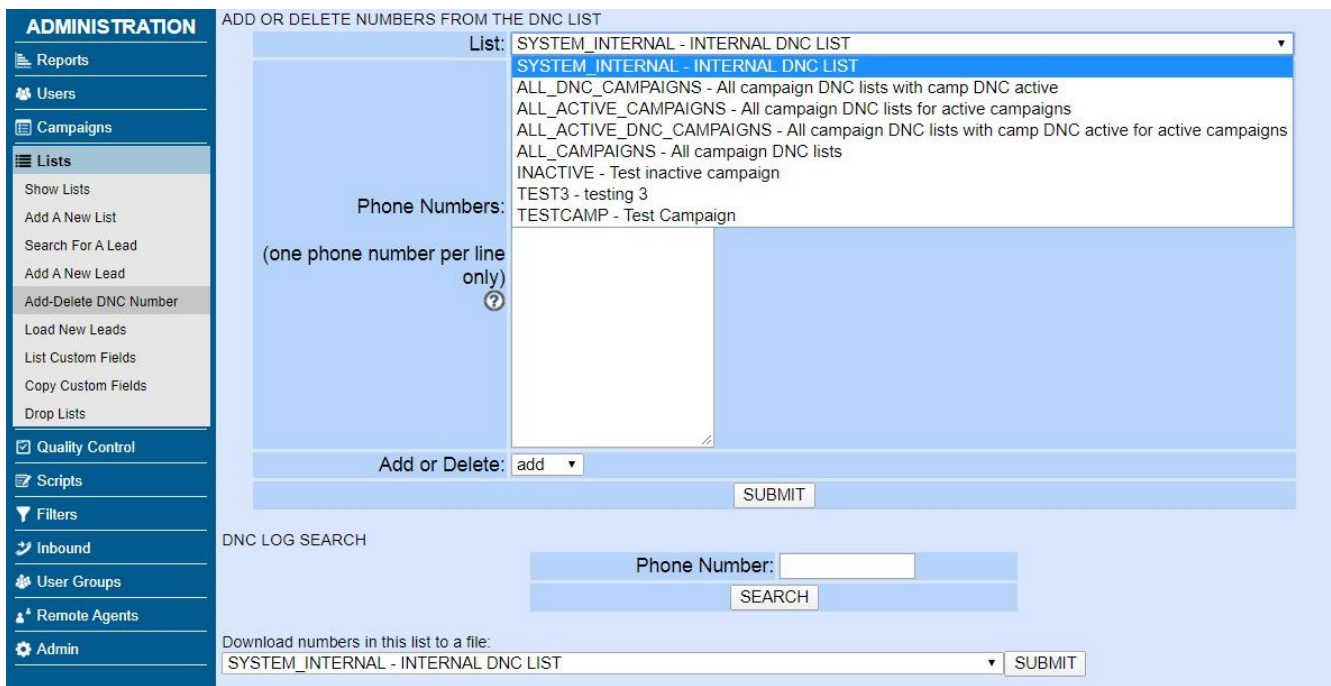
*(screen shot of the Modify List screen available in the Appendix)*

If you have permission, you can manually add a new lead into Dialer . At the top of the page select the list you wish to ass the lead to, from a pulldown of selections. Enter the customer's information in to the available default lead tables. Press "submit" once you are done to save your entry and submit it to the database.

## Modifying a Lead

If you have permission to alter lead information you can get to the lead modification page after

searching for a lead. On this page you will see full lead detail information and will be able to edit it, including the status and whether it is defined as a callback (either USERONLY, ANYONE, & the Dates). Also on this page is a call/email history for this lead, a recording history for this lead and recording access log for the lead, all including the user ID. If you have the GDPR feature enabled on your system, this is also the page where you can download all data, logs and recordings for a lead, as well as the feature that lets you delete identifiable data about that lead from the system.



**Figure 6. Add a Number to the DNC List**

## Add or Delete Numbers to/from the Internal and campaign DNC Lists

Dialer has an internal Do-Not-Call(DNC) list and campaign-specific DNC lists that can be used to filter leads by as they are being added to the hopper to be called. The DNC lists work real-time if you have activated it for a specific campaign and when agents disposition a call as a status that has the DNC flag set to Y, then it is immediately added to the internal and/or campaign-specific DNC lists. Another way of adding a phone number to the DNC list is using the “Add-Delete DNC Number” link in the LISTS section. Simply enter the phone number you want to add and click submit. If the number is already in the DNC list you will see a duplicate message. The same process also works for removing phone numbers from the DNC lists. You can also select to execute this functionality for all campaigns, all active campaigns and all DNC campaigns. To use this functionality you must have the proper permissions in the User settings.

You also have the ability to see when and who entered a specific phone number into the DNC list by using the “DNC LOG SEARCH” feature.

Dialer also offers the ability to download the complete list of DNC numbers, be it campaign specific or the internal DNC list. In the “Download numbers in this list to a file” pulldown, select the desired list & click "submit." This will export the indicated DNC list in a .txt format that can easily be open with any word processing or spreadsheet program.

Load leads from this file:  No file chosen ?

List ID Override:   (override template setting)

Phone Code Override:

File layout to use:  Standard Format  Custom layout  Custom Template ?

Custom Layout to Use:  [template builder](#) ?  
[View template info](#)

Lead Duplicate Check:  ?

DNC Scrub by Country:  ?

Status Duplicate Check:   
 222222 - test  
 A - Answering Machine  
 AA - Answering Machine Auto  
 AB - Busy Auto  
 ADC - Disconnected Number Auto

Status Mismatch Action:  ?

USA-Canada Check:  ?

Lead Time Zone Lookup:  ?

State Abbreviation Lookup:  ?

Required Phone Number Length:  ?

Invalid Phone Number Replacement:  ?

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**Figure 7. Web Lead Loader Main Screen**

## Download List

At the bottom of the list modification page is a link to download this list. In order to be able to do this you need to have the permission set in the User Modification page. Once you click on this link you will be presented with a “download file” window by your web browser. Simply save the file and open it in a spreadsheet program, text editor or database program to view the records. The file will contain all records in the list and all fields that are in the Dialer \_list table. If the list is very large, it is possible that you may not be able to download it this way. If that happens, contact your System Administrator.

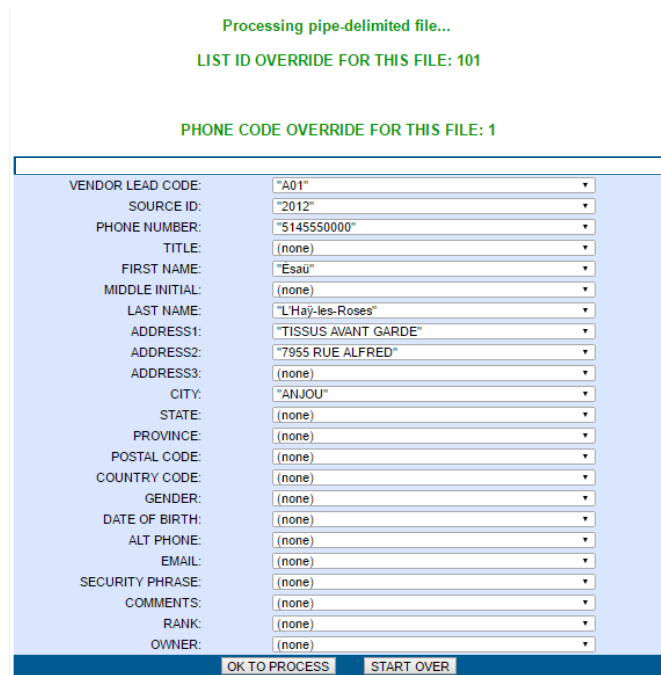
## Loading New Leads

If your account has permissions for it, you can load leads into the Dialer list through the web interface. You can get to the simple lead loader by clicking on the "LOAD NEW LEADS" link at the top of the LISTS section. The Dialer web-based lead loader is designed simply to take a lead file - up to 8MB in size typically - that is either tab, comma, or pipe delimited and load it into the Dialer \_list table. The lead loader does not perform data validation (other than removing all non-digits from the phone number and alt\_phone fields), so that is something you need to do before you load the leads. Also, make sure that you have created the list\_id that these leads are to be under so that you can use them. To associate leads with a list you can either enter a list ID in every record of the file, or you can use the list ID override field on the lead loader page to assign the same list ID to every record in the file while it imports. The Phone Code Override species the country or region code associated with the phone numbers being loaded. The Phone will also help determine the Timezone assigned to each lead.



Lead files can be imported into Dialer using one of three formats; Standard, Custom Layout, and Custom Template. Standard Layout requires the lead files to be arranged in the prescribed format shown here:

1. Vendor Lead Code - shows up in the Vendor ID field of the GUI
2. Source Code - internal use only for admins and DBAs
3. List ID - the list number that these leads will show up under
4. Phone Code - country code - 1 for US, 01144 for UK, 01161 for AUS, etc.
5. Phone Number - must be at least 8 digits long
6. Title - title of the customer - Mr. Ms. Mrs, etc...
7. First Name
8. Middle Initial
9. Last Name
10. Address Line 1
11. Address Line 2
12. Address Line 3
13. City
14. State - limited to 2 characters
15. Province
16. Postal Code
17. Country
18. Gender
19. Date of Birth
20. Alternate Phone Number
21. Email Address
22. Security Phrase
23. Comments
24. Rank
25. Owner



**Figure 8. Super Lead Loader Field Chooser**

There is also an option that allows for field choosing and TXT- Plain Text, CSV- Comma Separated Values and XLS or XLSX- Excel file formats. A tab-delimited or pipe delimited text file must end with “.txt”, a CSV(Comma Separated Values) file must end with “.csv” and an Excel file must end with “.xls” or “.xlsx”. It can also take both types (.sxc & .ods) of OpenOffice.org spreadsheet formats. To use this option you will need to select your file and then select whether you want to use the standard format (mentioned above), the custom format, or the customer template. If you select the standard format, the file will be loaded in and you will see a status display of how many leads were loaded in. If you select the custom format you will need to select the fields from the file that you want to be placed into each of the Dialer fields and then click submit to load the file in. Keep in mind that when you are going through and defining which column on the imported file will be loaded into the Dialer fields, any fields that are undefined will be left blank for all leads you load.

### ***Custom Lead Loader Templates***

Custom Template is useful when you need to import a lot of lists or you will need to load them often. To use custom template, you must 1<sup>st</sup> have a created template. If your lead files follow the same formatting, you simply build a custom template where you predefine which column on the imported file will be loaded into which table on your lists. This saves you the time of having to go through this

each time you load leads. To do so, click on the link “template builder”. Under “Create a new template” click the button and select a lead list to use to build your template. Provide the template with an ID (between 2-8 characters in length), a name, and if you wish, a description. Selecting a “List ID template will load into” allows to create a template that will take advantage of custom fields you may have already created on specific lists. After you've selected the List ID you'll see that list's data tables and a series of pulldown menus appear below. Once the list file has finished loading the pulldowns will be populated with data. Simply matchup the pulldown menu option to the corresponding data field in the same row (just as you did when using custom layout). Once you've assigned all the fields that will be needed for your template, click on the “SUBMIT TEMPLATE” to build it and save your changes. From then on, you can choose “Custom Template” for “File layout to use”. Then select the template you wish to use in the “Custom template to use” pulldown menu.

The custom template maker allows you to define your own file layouts for use with the list loader and also delete them, if necessary. If you frequently upload files that are in a consistent layout other than the standard layout, you may find this tool helpful. The saved layout will work on any uploaded file it matches, regardless of file type or delimiter.

**Create a new template** - In order to begin creating your new listloader template, you must first load a lead file that has the layout you wish to create the template for. Click Choose file, and open the file on your computer you wish to use. This will upload a copy to your server and process it to determine the file type and delimiter (for TXT files).

**Listloader Custom Template Maker** - Create your own file loading template with this tool. Useful when you load files in a consistent format or layout other than the dialer standard format, as it allows you to predefine field locations in lead files to bypass the steps to assign them otherwise.

**Edit/delete template** - If you have a template you wish to edit or delete, select the template from the drop-down menu and click the appropriate button, either EDIT TEMPLATE or DELETE TEMPLATE. EDIT TEMPLATE will load the template information and allow you to edit the name, description, and file layout. DELETE TEMPLATE will simply delete the template.

**Template ID** - This field is where you enter an arbitrary ID for your new custom template. It must be between 2 and 20 characters and consist of alphanumeric characters and underscores.

**Template Name** - This field is where you enter the name for your custom template. Can be up to 30 characters long.

**Template Description** - This field is where you enter the description for your custom template. It can be up to 255 characters long.

**List ID** - All templates must load their records into a list. Select a list ID to load leads into from this drop-down list, which will display any lists available to you given your user settings.

**Assigning columns** - Once you have loaded a sample lead file matching the layout you want to make into a template and select a list ID to load leads into, all of the available columns from the list table and the custom table for the list you selected (if any) will be displayed here. Columns highlighted in blue are standard columns from the list table. Columns highlighted in pink belong to the custom table for the selected list. Each column listed has a drop-down menu, which should be populated with the fields

from the first row of the sample lead file you uploaded. Assign the appropriate fields to the appropriate columns and press SUBMIT TEMPLATE to create your template. You do not need to assign every field to a column, and you do not need to assign every column a field.

*(There is a picture of the Lead Loader Template Editor in the appendix at the end of this manual)*

**Editing columns** - If you need to change the file layout the template expects from your uploaded files, you must enter the field number for each piece of data that appears in the base file. ***Since this feature is based on index values, the first field in the file row uses 0 as the index, not 1.*** Index values can be repeated, and data fields that share the same index will appear the -current file layout- above separated by the -pipe- character. Additionally, any non-numeric characters will be removed from the index value fields upon submission.

**Current File Layout** - This is simply a quote-comma-delimited approximation of the layout of the file your template is based on, going by the current template settings. Fields in the file that are not used in your template are shown as -unused- here.

NOTE : It's important not to click on any of the pulldown menus until the file of leads you are importing has fully loaded. If you do, the pulldowns will NEVER display any lead data, and you will need to refresh this page and start over from the beginning. We recommend using a small lead file ( less than 100 leads) to build your template, that way you'll only have to wait a few seconds for it to load.

If you would like the lead-loader to check for and remove duplicate records as it is loading, then select the “CHECK FOR DUPLICATES BY PHONE IN LIST ID” option in the Lead Duplicate Check menu. There are also options to check for duplicates by all of a specified campaign's lists as well as a system-wide duplication check. There are also duplication options that check for leads loaded only within the last 90-days.

While loading leads, the dialer can be used to ensure that the phone numbers correctly conform to the US & Canada's existing Area Codes and Prefixes.

If you are loading leads for the USA and you have zip codes in your lead file, you have the option of selecting the “POSTAL CODE FIRST” option in the Lead Timezone Lookup menu. Using this option will give you more accurate time zone coding of your lead file than just using area code to determine timezone. You can specify the timezone for each lead in the “owner” field, and have use that when loading leads by selecting “OWNER TIMEZONE CODE FIRST”. If you've loaded the NANPA list into the system, the dialer can draw upon that resource to calculate the timezone when “NANPA AREACODE PREFIX FIRST” has been chosen. The NANPA prefix list will give you more accurate time zone encoding of your USA and Canadian lead files within Dialer .

NOTE: The NANPA list is available for purchase at the dialer .org web store: <http://www.dialer.org/store.php#NANPA>

The leads will be timezone encoded when they are loaded and will be checked to see whether they are Daylight Savings Time(DST) for each lead or not. The timezone encoding is based upon the phone\_code, phone\_number and state fields depending upon the phone code for each record and what country the leads are from, or optionally in the USA by zip code. For Australia(phone\_code of 61) the state is used to figure out the timezone and DST scheme used for the lead. For the USA, Canada and

the Caribbean(phone\_code of 1) and for Mexico(phone\_code of 52) the first 3 digits of the phone\_number(otherwise known as the area code) are used to figure out the timezone for the lead, or optionally in the USA-only, by zip code. All other countries rely on the phone\_code for proper timezone assignments. You need to make sure that you have a proper phone\_code for each lead you are loading or timezone will be set to 0 or may possibly be set wrong. You will want to make sure that your Server Administrator has set the ADMIN\_adjust\_GMTnow\_on\_leads.pl script to be run every early morning so that the proper time restrictions will be updated if daylight savings time goes into effect.

**File Layout** - The layout of the file you are loading. Standard Format uses the pre-defined standard file format. Custom layout allows the user to define the layout of the file themselves. Custom template is a hybrid of the previous two options, which allows the user to use a custom format they have defined previously and saved using the Custom Template Maker.

**Template ID** - If the user has selected Custom layout from the File layout options, then this the template the lead loader will use. It will also override the selected list ID with the list ID that was assigned to the selected template when it was created.

**Duplicate Checking** - The duplicate options allow you to check for duplicate entries as you load the leads into the system. You can select to check for duplicates within only the same list, only the same campaign lists or within the entire system. If you have chosen a duplicate check method, you can also optionally select the only specific statuses that you want to duplicate check against.

**Status Mismatch Action** - Using this feature, if a lead being loaded into the dialer dupes out by phone number ,or title and alt\_phone, depending on the form settings, but does NOT dupe out against selected statuses from the -Status Duplicate Check- option, the user can opt to have the not-quite-duplicated leads already in the database moved to the current list being loaded into. The user can opt to only move the most recent occurrence of a duplicated-by-phone lead or ALL occurrences found, and also whether to only use the -Lead Duplicate Check- setting when searching for duplicates or the entire system, meaning the scope of the status mismatch action can be different from the scope of the -Lead Duplicate Check- setting. This feature is ignored if you are deduping against all statuses. <B>Use caution when utilizing this feature since it involves potential migration of large numbers of leads.

**USA-Canada Check** - This option is designed to filter out bad numbers in the USA and CANADA. The PREFIX check will make sure the fourth digit of the phone number is not a 0 or a 1. The AREACOE check will ensure that the first 3 digits of the phone number is a valid North American areacode. The NANPA PREFIX check will use the optional NANPA database to check for valid areacode and 3-digit prefixes, this database is not included by default. Default is disabled.

**DNC Scrub by Country** - If International DNC lists are loaded into your system, you can select the country code from this pull-down option to enable DNC scrubbing for that country. Default is disabled.

**Lead Time Zone Lookup** - This is the method used to code each lead to a time-zone in the system. COUNTRY CODE AND AREA CODE ONLY will use only the phone code and the phone number areacode to determine the timezone of a lead, this method is also the second lookup option if one of the other chosen methods does not find a time zone for a lead. POSTAL CODE FIRST will work for USA addresses only that have a postal code populated. OWNER TIME ZONE CODE FIRST will use the 3 or 4 character timezone abbreviation in the lead -owner- field to determine the timezone, must use valid TZ codes like EST, CST, MST, PST, etc... NANPA AREACODE PREFIX FIRST will use the optional

NANPA database for time zone lookups, this database is not included by default. Default is COUNTRY CODE AND AREA CODE ONLY.

**State Abbreviation Lookup** - If your lead file has state names spelled out and you would like to load them into the state field as their two-character abbreviations, this feature will look up the abbreviation from the internal database. Default is DISABLED.

**Required Phone Number Length** – If enabled in System Settings, this option can reject leads that have a phone number that is not of the correct length.

**Invalid Phone Number Replacement** - If enabled, this option will try to replace an invalid phone\_number lead value with either the alt\_phone or address3 value in the same lead. This can be made active only in cases where the number is INVALID, and-or the number is a DUPLICATE, and-or the number is an International DNC match. The -empty-rep-value- options will set the replacement field to blank if it has been used to replace the phone\_number for a lead. For example, if the phone\_number is invalid and is replaced with a valid alt\_phone, then the alt\_phone field will be blank if one of the -empty-rep-value- options is used. Default is DISABLED.

*NOTE: the above feature is available on the non-linked “admin\_listloader\_fifth\_gen.php” Fifth-Generation web lead loader that is not linked to from the admin web screens, but it is included on newer Dialer installs.*

## List Custom Fields

Create new fields to display additional information to the agents. This can also allow them to gather customer information and retain it with the lead. All customer fields will appear on the “Web Form” tab of the agent interface. Once a Custom Field is created for a List, that field will be visible on the lead loading page for that List. Use the “Copy Custom Fields” to easily copy created fields to new lists. If the lead is moved to another list (by way of a Dispo Call URL script, or another method), it will keep the custom fields associated with the initial list that it had been loaded into. If the lead was never viewed by a user prior to moving to a new list, then it will maintain the custom fields of the first list the lead was viewed from. The new custom lead tables are able to be used in any of the various API script functions, however CUSTOM FIELDS CANNOT BE USED IN A FILTER.

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists**
  - Show Lists
  - Add A New List
  - Search For A Lead
  - Add A New Lead
  - Add DNC Number
  - Load New Leads
  - List Custom Fields
  - Copy Custom Fields
  - Drop Lists
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

Modify Custom Fields: List ID 998 - Test dump list Records in this custom table: 59

SUMMARY OF FIELDS:

RANK	LABEL	NAME	TYPE	ENC	COST
1 - 1	weight	Score Weight:	TEXT	N	303
TOTALS:		1		0	303

EXAMPLE OF CUSTOM FORM:

Score Weight:

MODIFY EXISTING FIELDS:

Field Label 1: **weight** ?

Field Rank 1:  ? Field Order:  ? Re-Rank Fields Below:  ?

Field Name 1:  ?

Field Name Position 1:  ?

Field Description 1:  ?

Field Help 1:  ?

Field Type 1:  ?

Field Options 1:  ?

Option Position 1:  ?

Field Size 1:  ?

Field Max 1:  ?

Field Default 1:  ?

Field Required 1:  ?

Field Duplicate 1:  ?

Field Encrypt 1:  ?

Field Show Hide:  ?

ADD A NEW CUSTOM FIELD FOR THIS LIST:

New Field Rank:  ? Field Order:  ? Re-Rank Fields Below:  ?

Field Label:  ?

Field Name:  ?

Field Name Position:  ?

Field Description:  ?

Field Help:  ?

Field Type:  ?

Field Options:  ?

Option Position:  ?

Field Size:  ?

Field Max:  ?

Field Default:  ?

Field Required:  ?

Field Duplicate:  ?

Field Encrypt:  ?

Field Show Hide:  ?

[Go to the list modification page for this list](#)  
[Click here to see Admin changes to this lists custom fields](#)

**Figure 9. Custom fields creation screen**

**New Field Rank:** The order, from the top of the page to the bottom, that the fields will appear. “New Field Rank:1” will be at the very top & successive numbers go down the page. Fields with the same rank will appear on the same row.

**Re-Rank Fields Below** - If set to YES, this option will move existing other fields of an equal or lower rank down on the form by one place. Default is NO.

**Field Order:** Determines the order fields appear in the same row, starting from left to right. “Field Order: 1” would be all the way to the left & successive numbered fields will progress to the right.

**Field Label:** The lead table name for this field in the database. This can either be a brand-new field or default Dialer field. If you choose to use a default Dialer field, the name will appear in **red** once the field has been created. Examples of default fields are - *lead\_id, vendor\_lead\_code, source\_id, list\_id, gmt\_offset\_now, called\_since\_last\_reset, phone\_code, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, called\_count, last\_local\_call\_time, rank, owner, user\_group*

Because this is a database table this field has a few specific name requirements

1. Minimum of 2 & a maximum of 50 characters
2. No spaces or punctuation (use an underscore \_ instead of spaces).

**Field Name:** What will appear for this field, to the agent on their interface. This could be as simple as the name of the field, or a question the agent needs to read to the customer verbatim. This field is a minimum of 2 & a maximum of 50 characters. It will allow spaces, but no punctuation.

**Field Name Position:** In the agent interface, this is the position of the Field Name relative to the field itself. If set to LEFT, the Field Name is directly to the left of the field. If set to TOP, the Field Name directly above the field.

**Field Description:** The description of this field as it will appear in the administration interface. This is an optional field with a maximum of 100 characters.

**Field Help:** What the agent will see when they press the “help+” link next to the Custom Field. This should contain any additional direction you wish to provide the agent. Once the agent clicks on the link it will change to “help-”.

**Field Type:** Determines how the field will look and function. The options are:

TEXT: a standard, single-line text entry box (mandatory additional field: Field Size, Field Max)

AREA: a standard, multi-line text entry box (mandatory additional fields: Field Size, Field Max)

SELECT: a single-selection pulldown menu (mandatory additional fields: Field Options)

MULTI: a box offering multiple selections (mandatory additional fields: Field Options, Field Size)

RADIO: a list of radio buttons, where only 1 option may be selected (mandatory additional field: Field Options, Option Position)

CHECKBOX: a list of checkboxes, where multiple options may be selected ((mandatory additional field: Field Options, Option Position)

DATE: a year month day calendar popup where the agent can select the date (mandatory additional fields: none)



**TIME**: a time selection box (mandatory additional fields: none)

**DISPLAY**: a display only field. This will not allow modification by the agent. This information would be on the lead when it was loaded. This type of field could also display information from a default Dialer field. (mandatory additional fields: Field Size, Field Max)

**SCRIPT**: A display only field. This field type can only use script variables just like in the Scripts feature. (mandatory additional fields: Field Size, Field Max)

**HIDDEN**: This field type will never be visible to the agent, but will allow the field to have data imported into it and exported from it, as well as have it available to the script tab and web form address. (mandatory additional fields: Field Max)

**HIDEBLOB**: similar to HIDDEN except the data storage type on the database is a BLOB type, suitable for binary data or data that needs to be secured. (mandatory additional fields: Field Max)

**READONLY**: a display only field, it will not allow modification by the agent. This differs from the DISPLAY field type because this field MUST have the Field Label identical to a default Dialer field. The “Field Default” does not work on this type of field. (mandatory additional fields: Field Size, Field Max)

**HIDEBLOB** is similar to HIDDEN except the data storage type on the database is a BLOB type, suitable for binary data or data that needs to be secured.

**SWITCH** field type allows the agent to switch the lead custom fields to another list, as well as reloading the FORM tab with the new set of list custom fields for the new list. To configure SWITCH type fields, you must define the button values below in the Field Options box.

**SOURCESELECT** is a single-selection pull-down menu where there are multiple sets of options available depending on the value of another -source- field for the lead, see the Field Options help for more details. If the -source- field that a SOURCESELECT menu is tied to changes in value, the menu will automatically update to reflect the new value of the source.

**BUTTON** will allow you to commit changes made to the form and reload it, the Field Name will be the text next to the button, the Field Default will be the text on the button, and the Field Options will need to be SubmitRefresh with the Field Size set to 1 for it to function.

**Field Options**: For the SELECT, SOURCESELECT, MULTI, RADIO and CHECKBOX field types, you must define the option values in this box. Place the comma separated option label (how it appears in the database) & option text (how it appears in the agent interface) with each option, on its own line. The first value should have no capitalization or spaces in it (use an underscore instead), & neither value should have any punctuation.

For example: electric\_meter, Electric Meter  
mortgage\_rate, Mortgage Rate  
income\_level, Income Level

For the SCRIPT field types, this field is where you put your script contents. You can use single quote and ampersand characters as well so that you can create links and iframe elements. If you want to put urlencoded fields in this area, make sure you use the --U-- and --V-- flags for your variables instead of using A and B, for example --U--test\_field--V--. You can also use the --M-- and --N-- flags to enclose basic Math equations to have them calculated when the script is loaded initially, for example multiplying test\_field by 12 would be entered with --M--(--A--test\_field--B-- \* 12)--N--. For the SWITCH field type, you should define the list ID for the custom fields as well as the text that you want to appear in the button to activate the new form in a comma separated line, with one line for each button you want to appear. For the SWITCH field type, it is a requirement that one of the entries be the current list ID. For BUTTON, the only current option is to put SubmitRefresh as the Field Options, which will commit any changes you have made in the form and reload the form panel. For SOURCESELECT, if this field is set to use the -province- field to determine what values to use for

example, then the first line in the Field Options box should be -source=>province-, without the dashes. As a note, you can only link a SOURCESELECT menu to a source field that is a TEXT, READONLY or SELECT field type. The next options line will be the first province value to look for, for example -value=>Ontario-, and if the value for that field for the lead matches, the next lines will be the options to show with the value and display text separated by a pipe. After that, you can add more values each with options after them, like the example below shows:

```
source=>province
value=>Ontario
option=>|select month here
option=>September|September
option=>October|October
value=>Nova Scotia
option=>|select month here
option=>June|June
option=>July|July
option=>August|August
value=>British Columbia
option=>|select month here
option=>January|January
option=>February|February
option=>March|March
value=>
option=>|no match
```

This field is limited to 5000 characters in length, but you can double that by altering the database if you need to.

**Option Position:** For the CHECKBOX & RADIO fields, this will determine how their multiple selections are oriented.

**Field Size:** This has 2 different effects depending on the Field Type.

TEXT, AREA Fields: This determines the width of the text box, in characters, on the agent's screen.

MULTI Fields: This defines the number of options visible in the list.

For BUTTON fields this must be set to 1.

(This is unused for the remaining Field Types)

**Field Max:** This has 2 different effects depending on the Field Type.

TEXT, HIDDEN, READONLY Fields: This is the maximum number of characters allowed in the field.

AREA Fields: This is the number of rows tall the text box on the Agent's screen will be.

(This is unused for the remaining Field Types)

**Field Default:** An optional field, this lets you define what value to assign to a field if nothing is loaded into it. This field does not work with the READONLY “Field Type”. Default is NULL, which disables the field.

DATE field types: the default is always set to today unless a number is put in in which case the date will be that many days plus or minus today.

TIME field types, the default is always set to the current server time unless a number is put in in which

case the time will be that many minutes plus or minus current time. For BUTTON fields, this is the text that appears on the button.

**Field Required:** If the campaign option allowing required fields is also enabled, this field allows you to force an agent to fill in this field before they can hang up the call. Y will affect all calls, INBOUND\_ONLY will only affect calls received by the agent through an In-Group. This option will only work for the following custom field types: TEXT, AREA, DATE, SELECT, MULTI, RADIO, CHECKBOX. Default is N.

**Field Duplicate:** This option will allow you to create a duplicate of a TEXT type custom field that already exists in a different location within your custom list fields form. This option only works with TEXT type fields. This option is only available when you create a new custom field entry. When an agent modifies the text in one of these duplicate fields and clicks to another field, the system will copy the value that they place in that duplicate field to the original field. Default is N.

**Field Cost:** The cost of the customer field for this list, based on the size and complexity. The per field cost limit is 999, simply because the Field Cost indicator will not exceed 3 digits. When creating a field that large, we recommend using the AREA type since it maintains a very small fixed cost no matter how much data is going to be entered into it. The maximum cost per list, for all Custom Fields, should never exceed 65,000.

After entering a new Custom Field entry, check the top of the page for any errors. The error message will indicate what needs to be corrected before the entry is complete and ready for use. Keep in mind, some errors will allow the field to appear in the Customer Fields listing, but not within the database.

### **Please Be Aware**

-The following words CANNOT be used as field labels for Custom Fields because they are database reserved words:

*accessible, action, add, all, alter, analyze, and, as, asc, asensitive, before, between, bigint, binary, bit, blob, both, by, call, cascade, case, change, char, character, check, collate, column, condition, constraint, continue, convert, create, cross, current\_date, current\_time, current\_timestamp, current\_user, cursor, database, databases, date, day\_hour, day\_microsecond, day\_minute, day\_second, dec, decimal, declare, default, delayed, delete, desc, describe, deterministic, distinct, distinctrow, div, double, drop, dual, each, else, elseif, enclosed, enum, escaped, exists, exit, explain, false, fetch, float, float4, float8, for, force, foreign, from, fulltext, grant, group, having, high\_priority, hour\_microsecond, hour\_minute, hour\_second, if, ignore, in, index, infile, inner, inout, insensitive, insert, int, int1, int2, int3, int4, int8, integer, interval, into, is, iterate, join, key, keys, kill, leading, leave, left, like, limit, linear, lines, load, localtime, localtimestamp, lock, long, longblob, longtext, loop, low\_priority, master\_ssl\_verify\_server\_cert, match, mediumblob, mediumint, mediumtext, middleint, minute\_microsecond, minute\_second, mod, modifies, mysql, natural, no, no\_write\_to\_binlog, not, null, numeric, on, optimize, option, optionally, or, order, out, outer, outfile, precision, primary, procedure, purge, range, read, read\_only, read\_write, reads, real, references, regexp, release, remove, rename, repeat, replace, require, restrict, return, revoke, right, rlike, schema, schemas, second\_microsecond, select, sensitive, separator, set, show, smallint, spatial, specific, sql, sql\_big\_result, sql\_calc\_found\_rows, sql\_small\_result, sqlexception, sqlstate, sqlwarning, ssl, starting, straight\_join, table, terminated, text, then, time, timestamp, tinyblob, tinyint, tinytext, to, trailing, trigger, true, undo, union, unique, unlock, unsigned, update, usage, use, using, utc\_date, utc\_time, utc\_timestamp, values, varbinary, varchar, varcharacter, varying, when, where, while, with, write, xor, year\_month, zerofill,*

*partition.*

This means that the whole field label cannot be one of the words above, however they can be used as part of a field label, i.e. "*repeat\_session*" would be OK, while "*repeat*" would not.

-The word "*status*" should NEVER be used as a custom field label because that could be overridden by whatever disposition the agent chooses, once the call is over.

-We strongly recommend NOT using the following field labels:

*lead\_id, list\_id, gmt\_offset\_now, called\_since\_last\_reset, gender, comments, called\_count, last\_local\_call\_time, status, entry\_date, entry\_list\_id, modify\_date, user*

Using the above fields as field labels in custom fields can result in issues and inconsistent data entry, so we do not recommend using them.

### ***Encrypted and Hidden Custom Fields***

On the VICIhost.com platform, there are a couple of additional options that are available for use with Custom List Fields.

Custom fields encryption allows for Dialer custom fields to be stored on the database as encrypted data using a 256-bit AES crypt key stored only on the webserver. This level of encryption is NIST(National Institute of Standards Technology) approved, and as such can be used for PCI compliant data storage.

Due to the requirements needed for this functionality to operate properly, this new module is only available to customers of the VICIhost hosted contact center solution.

**Field Encrypt** - On the ViciHost.com platform a built-in, high-level NIST-approved encryption option is available for custom fields. Default is N.

**Field Show Hide** - On the ViciHost.com platform, this option allows you to display only set characters from a READONLY or TEXT field. If a TEXT field, the value and a blank field will be displayed, if the blank field is populated by the agent, then the previous value will be overwritten when the agent completes their call. Default is N.

#### NOTES:

Here are the field types that can be set as Encrypted: TEXT, HIDDEN, READONLY, HIDEBLOB, AREA, DATE, TIME

You can only set a field to Encrypted = Y if the list has no records in it, or if you are adding a new custom field. Once a field exists and has data, the option to set it to encrypted is disabled in the web interface. A VICIhost administrator can manually change a field with existing records to encrypted or decrypted upon request.

Encrypted custom fields values cannot be used in SCRIPT variables to be displayed within the agent Script tab.

Encrypted custom fields values cannot be used in WEBFORM variables.

Encrypted custom fields values cannot be used in NA CALL URL or ADD LEAD URL variables, or in Remote Agent START CALL URL variables.

Keep in mind that setting a field to Encrypted = Y will greatly increase the storage size of that field. For example, a 1-character field might take up to 25 characters to store the encrypted value, or an 8 character field might take 30 characters to store.

Another new option available only with on systems that have encryption enabled is the ability to hide all, or parts, of the contents of READONLY and TEXT fields(whether they are encrypted or not). This is controlled from the “Field Show Hide” custom field option, and within the Export Reports, Download List and Admin Modify Lead pages it can be overridden with the “Admin Custom Fields Show Hidden” user option, detailed below:

**Admin Custom Fields Show Hidden** - On the ViciHost.com platform this option allows an administrator to view or export custom fields that are partially or fully hidden using the Show Hide field options. Default is 0 for disabled.

## Drop Lists

Drop Lists are a feature that allows you to add new leads to a list built from DROPPed calls from inbound groups on a scheduled basis. To enable Drop Lists, you need to go to Admin -> System Settings, and Enabled Drop Lists. Then you can go to Lists -> Drop Lists, and Add a New Drop List.

**Drop List ID** - This is the ID of the Drop List entry, it must be from 2 to 30 characters in length and contain no spaces.

**Drop List Name** - This is the name of the Drop List entry, it must be from 2 to 100 characters in length and it used to describe the drop list.

**Last Run Time** - This is the date and time of the last run of this drop list process.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user with Modify Lists permissions to view this record.

**Run Server** - This is the machine that you want to use to run this drop list process. You must choose a server that runs the keepalive process every minute in the crontab. The default is to use the active voicemail server as defined in System Settings.

**Run Times** - This is the list of times in HHMM format when you want the drop list process to run. You can specify multiple times by separating them with a dash, like how the List Reset Times feature works. The drop list process will gather all of the matching records since the last time the process was run.

**Run Weekdays** - This is the list of days of the week when you want the drop list process to run. Either

this option or the Month Days field below must be set for the process to run automatically.

**Run Month Days** - This is the list of days of the month in DD format when you want the drop list process to run. You can specify multiple month days by separating them with a dash. Either this option or the Weekdays field above must be set for the process to run automatically.

**Duplicate Check** - This setting allows you to specify if the drop list process will check for duplicates before adding a new lead that was gathered from the drop list process. You can select LIST which will check for duplicate phone numbers within the leads already within the specified list or LIST\_CAMPAIGN\_LISTS which will also check for duplicate phone numbers within all of the lists associated with the campaign that the list defined below is assigned to. Default is NONE for no duplicate checking.

**List ID** - This is the list ID of the list that the new leads gathered from the drop list process are to be inserted into.

**Active** - The drop list process will only run on the set schedule above if active is set to Y. Default is N.

**Gather Minutes** - If set to a number greater than 0, the process will look back this number of minutes from the run time to gather the drop call data. Default is 0 for disabled.

**Run Now Trigger** - This option offers a way to test this drop list process before setting it to active. It can take up to one minute for the process to start running after submitting this page with this field set to Y. Default is N.

**Drop Statuses** - This is the list of drop statuses that will be used to gather the new leads by the drop list process. Default is DROP.

**Inbound Groups** - This is the list of Inbound Groups that will be used to gather the new leads by the drop list process.

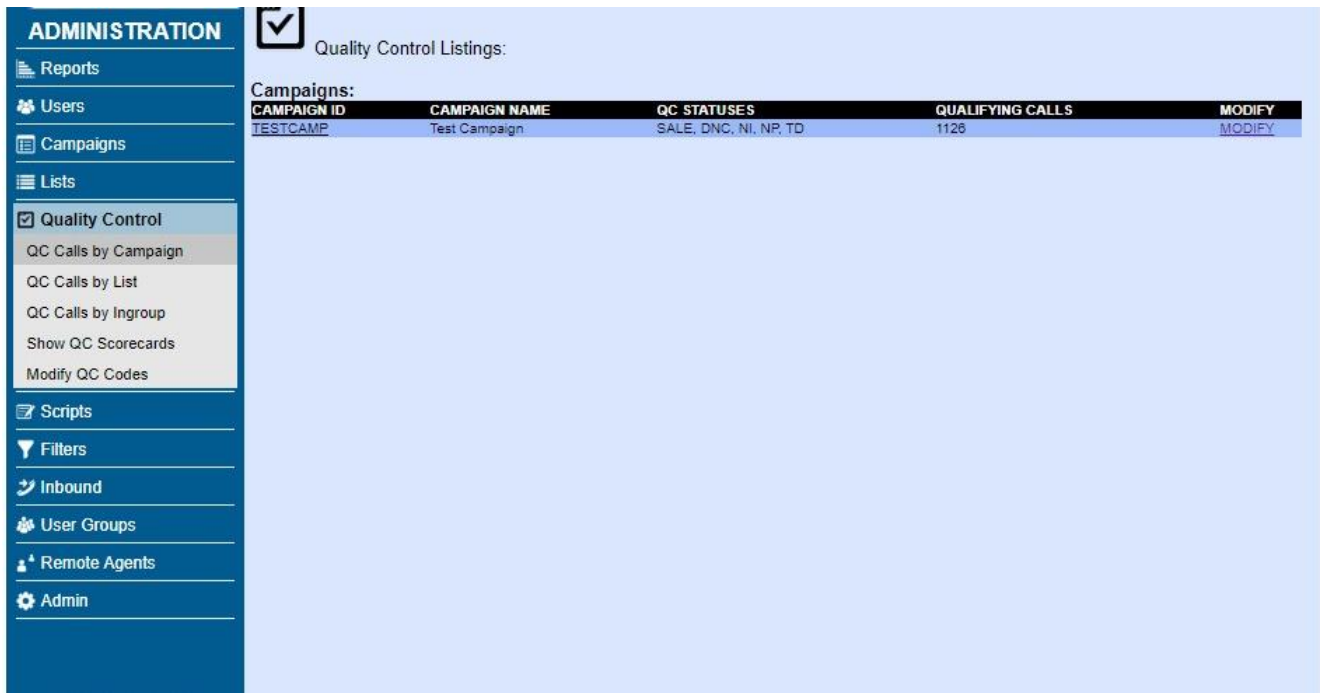


Figure 10. Quality Control List

## Dialer QUALITY CONTROL

The Quality Control module built into Dialer allows admins a process to easily review their agent's work and verify customer information. The administrators, in advance, pre-select specific campaigns and call statuses for audit. Once an agent (staffing a QC enabled campaign) selects a QC enabled status the lead is marked for review and entered into the Quality Control process. Since the last version of this manual, we have overhauled and extended the QC system in Dialer, adding "QC Scorecards" as well as a new QC Report. Below are the instructions for how to set up and use Dialer Quality Control.

### STEP 1. Admin -> System Settings

No quality control features can be accessed at all unless the "QC Features enabled" System Setting is activated. This is located in the "System Settings" page, along with the related system settings of "QC Claim Limit" and "QC Expire Days".

"**QC Claim Limit**" places a limit on the number of unfinished calls an individual agent can have in their queue at one time. The purpose of this setting is both to prevent a single agent from monopolizing the calls in a queue, and also to ensure that claimed calls are handled relatively promptly.

"**QC Expire Days**" puts a limit on the number of days a call will be available to be claimed by an agent, after which it will no longer be available for review if it stays unclaimed. However, once a call is claimed it does not expire (unless the agent releases it from their queue after the expiration date has passed).

To start funneling qualifying calls into the quality control queue, a campaign, ingroup, and/or a list must have a QC status template and a QC scorecard assigned to it. Then there must be a call whose disposition is given in the applied status template and the call will appear in the quality control queue.

## **STEP 2. QC status templates**

A quality control status template can be created as a settings container of the type "QC\_TEMPLATE". All it needs to consist of is a comma-delimited list of dispositions. Once created and activated, it will be available for selection anywhere the status template is set.

## **STEP 3. QC Scorecards**

A scorecard is a list of checkpoints, each assigned a point value, that an agent follows as they are reviewing a call. A scorecard must consist of at least one checkpoint and be active in order for it to be appear as an option when applying quality control settings to entities. To start creating a scorecard, go to the QC Scorecards page - the link can be found under the "Quality Control" menu.

Click "ADD NEW SCORECARD", which will bring up a simple three-field form where you give the scorecard ID, name, and whether or not the scorecard is active. Clicking "SUBMIT NEW SCORECARD" will cause the new scorecard to appear at the top of the screen. At this point you can de/activate the scorecard, modify it, or delete it. Once created, scorecards can be de/activated simply by checking or unchecking the "Active" checkbox for each scorecard - no form submission is necessary. Clicking the "DELETE" button will cause the screen to prompt you to confirm that you do want to proceed with deleting the scorecard, similar to deleting other dialer entities such as campaigns or lists.

Clicking "MODIFY" by any scorecard will display the checkpoints for that scorecard below the list of created scorecards, along with an extra form for adding new checkpoints. A checkpoint consists of the following elements:

- Order - this is the order in which the checkpoints will be displayed on screen.
- Active - much like the scorecard itself, individual checkpoints can be activated and de-activated as needed. When a checkpoint is deactivated, if a call is assigned to it's parent scorecard, that checkpoint will not appear on the QC evaluation page. Additionally, re-activating the checkpoint will not retroactively add the checkpoint to already-claimed calls; claimed calls must be released and re-claimed if activated checkpoints need to be shown for said calls.
- Checkpoint text - the text displayed to the QC agents
- Points - The maximum score a checkpoint is worth. QC agents can enter any integer value that is this score or lower, with a minimum limit of zero.
- Instant kill - If this is activated, a checkpoint can automatically fail a quality control record regardless of the outcome of any and all other checkpoints.
- Admin notes - Admin notes are comments that administrators can make regarding a checkpoint. This is never viewable to the QC agent.

If the above fields are filled out in the "ADD NEW CHECKPOINT" section, clicking the green "ADD" button will add it to the scorecard.

To modify any portion of an existing checkpoint, simply make whatever change is necessary to the



checkpoint - changes are automatically saved and there is no need for a submit button.

## **STEP 4. Applying QC settings**

Once status templates and scorecards are defined, they can be applied to campaigns, lists, and ingroups via the "QC Statuses" and "QC scorecards" settings in each, which will only appear if the QC feature is enabled through the system setting in step 1. For campaigns, you must view the campaign settings in "Detail" view mode, and use the "QC" link that appears in the upper right. For lists and ingroups, the QC settings appear among their other settings. In the event of conflicting settings, the order of priority is ingroup -> list -> campaign.

## **STEP 5. Claiming calls**

Under the new QC system, quality control is done on a per-call basis, meaning leads that may not currently have a status covered by a QC template can still be reviewed if a past call was dispositioned with a status covered by a QC\_TEMPLATE settings container that was applied to a campaign/list/ingroup the call belongs to.

Calls can be claimed and evaluated via three links under the "Quality Control" menu in the Admin - "QC Calls by Campaign", "QC Calls by List", and "QC Calls by Ingroup". Clicking on one of these links will show any QC-enabled campaign/list/ingroup that is currently active along with a list of the current QC-eligible statuses assigned to it and the number of qualifying calls currently in the system available to be claimed (this count is affected not only by the statuses assigned, but also the expiration days set in the System Settings). Additionally, the user group's QC settings will filter out any campaign/list/ingroup the user is not allowed to view. For lists, the filtering is done using the list's current campaign against the list of allowed QC campaigns per the user group settings.

When you claim a call, the dialer will assign the most appropriate scorecard for the lead at the time the lead is claimed. This means if the same call would appear on different claim lists in the admin, the dialer will assign the scorecard associated with the higher-priority element (ingroup -> list -> campaign) regardless of which "QC calls" section it's claimed from. For example, if a campaign shows a call to a lead as being eligible for being claimed based on the campaign QC settings, and the same call meets the QC settings assigned to a list, the scorecard for the list will be assigned to the QC session even if it is claimed from the "QC Calls by Campaign" page.

Clicking on a record here will take you to a page that will display any calls you currently have claimed and unfinished, and if you have fewer claimed calls than the "QC Claim Limit" system setting, all the available calls under the campaign/list/ingroup will be shown grouped by status and ordered by call date. Each record displays the lead ID, name on the lead, date of the call, and the agent who made the call. Clicking on the lead ID, name, or call date will "claim" the call and take you to the quality control interface to evaluate the call.

## **STEP 6. Using the QC display screen**

Across the top of the screen, the page will print which campaign, ingroup, or list the call fits under per your dialer's settings. The QC display screen consists of four sections, of which one can be displayed at any time and can be toggled via the buttons across the top of the screen.

The section you see by default contains the scorecard. The header of each scorecard displays the scorecard ID and also the recording ID for that particular call. The recording ID is matched via the uniqueid from the dialer \_agent\_log table to the dialer \_id in the recording\_log table. If there is no matching recording, then the default recording becomes the one in the recording log that is closest to the date and time of the call. Beneath the header each active checkpoint is displayed in the order designated by the scorecard's settings. This is where each checkpoint's score can be entered, along with any comments regarding said checkpoint. Scores and comments are automatically saved when they are entered. Beneath the checkpoints is the link to play the recording for the call. Underneath that are the available statuses that quality control can apply to the call when the evaluation is completed, with a button to FINISH the call. Clicking this will mark the call as finished and take you back to the Quality Control section in the admin. Alternatively, there is a red "RELEASE" button. This is clicked when the call needs to be placed back into the quality control queue. It relinquishes ownership of the call and purges any scorecard data pertaining to the call. This can be used to re-claim the call, which can be useful if the scorecard for the call has been modified since the call was originally claimed. Finally in this section, a list of all recordings made for this lead are displayed below the scorecard and can be listened to here, in the event another phone call needs to be checked in order to finish the scorecard.

The second section is for lead information, where the agent can view the lead information for the called lead in the standard dialer \_list fields. Additionally, if a QC webform was defined for the campaign, list, or ingroup under which the lead is being evaluated, the link to the webform will appear here as well. If custom fields are defined for the lead, those will appear within a frame at the bottom of the screen. Like with the scorecards, modifying the standard lead information will cause it to be automatically updated in the dialer \_list table. Custom lead information still requires use of a submit button.

The third section pertains to callbacks for the lead. If you are currently logged into the agent interface in a separate window, you can be given the option to dial the lead from here by clicking on the "Dial lead" link within the frame that appears at the top of the section. Additionally, if you dial the lead and make changes to the customer information within the agent interface, the QC interface will also auto-update to match what you entered once you disposition the call.

Below the callback frame, any current callbacks for this lead are displayed. These can be modified to change ownership to a specific user or to "ANYONE", and also the call date and time can be modified.

The final section is the log section - this is a read-only section where you can view the quality control logs pertaining to the call being evaluated. The log records will show date and time, status changes to the call (if any), who viewed the call, and also if lead information is changed on a specific log record, that log records will show the word "DETAILS" on the right and you can see specifically what was changed if you hover your mouse over that word.

Beneath that are the "common" log records, showing calls to this lead (outbound), closer records for this lead (inbound), and agent log records.

## **STEP 7. Quality Control Report**

This report shows quality control call activity within user-selected parameters. If displayed as HTML, it will output each individual call with a header row that shows things like the call date, agent,

campaign, call status, QC scorecard and QC result. Underneath that, each checkpoint in the scorecard applied to call will be displayed as individual rows with scores and comments per checkpoint. The report can also be downloaded as a CSV where each call will be a row in the resulting file with the checkpoint data appended to each row.

Report parameters are:

- CALL DATE - The date range in which the call was originally made.
- FINISH DATE - The date range in which the QC agent who evaluated the call marked it as finished. This will automatically filter out unfinished calls if this is used, regardless of what QC statuses (see below) are selected.
- CAMPAIGNS - The campaign the original call was made under.
- QC STATUS - The current status of the call in the quality control system - this is NOT the call status from dialing.
- USERS - The agent(s) who placed the original calls.
- QC AGENTS - The agents who evaluated the call in the quality control system.
- SHOW %'s - If this box is checked, the scores given by the QC agents will be displayed as percentages instead of points.
- SEARCH ARCHIVED DATA - If this is checked, the archived quality control log tables will be searched if they exist.

## Show QC Campaigns

*(screen shot of the Modify List screen available in the Appendix)*

This screen displays all the campaigns that are currently enabled for Quality Control. It shows the campaign ID, campaign name, and the statuses selected for QC review. Clicking on the Campaign ID link displays all leads currently in the audit process for that campaign. They are grouped by status, and arranged by “Last Modified” date & time. There is also a link to review each lead record.

Since the QC settings are selected on the campaign itself, the “modify” link goes to the detail view for the campaign. This allows the Quality Control settings to be changed quickly from this central menu. (See the QC settings in the “Dialer CAMPAIGNS” section of this manual for more details). QC process documentation and advice is available at: [http://dialer.org/docs/QC\\_PROCESS.txt](http://dialer.org/docs/QC_PROCESS.txt)

## Enter QC Queue

This link routes to the same destination as “Show QC Campaigns.”

## Modify QC Codes

*(screen shot of the Modify List screen available in the Appendix)*

Allows admins to create new QC status codes for use in their Quality Control system. In this section they can create the QC status code and provide a description. Finally, a QC category is assigned to the new QC status, indicating an action of either PASS, FAIL, CANCEL or COMMIT.

## QC Scorecards

**Active (checkpoint)** - Whether or not the checkpoint is active within the scorecard. Inactive

checkpoints are not displayed outside the QC scorecard interface.

**Checkpoint Admin Notes** - Any administrative notes - these are not viewable to the QC agent.

**Checkpoint Text** - The text instructions for the agent to follow.

**Preset Comments** - If you want to give the quality control agents the option of adding standardized comments to their QC comments per checkpoint, type them into the corresponding "Preset comments" box, one per line. If a checkpoint has preset comments, they will appear in a drop-down menu to the right of the agent's comment box in their scorecard interface and can be inserted into the comments box by selecting the comment and clicking either the "ADD TO COMMENTS" or "TIMESTAMP & ADD" button.

**Instant Fail** - Whether or not the checkpoint will have the option to instantly fail the call.

**Modifying checkpoints** - Any changes made to a checkpoint will be saved automatically so there is no "UPDATE" or "MODIFY" button necessary.

**Active (scorecard)** - Whether or not the new scorecard is active. Inactive scorecards are not viewable or usable outside the QC scorecard interface.

**New Scorecard ID** - The ID code of the new scorecard, similar to the ID of campaigns, user groups, in-groups, etc. Alphanumeric, 20-character max

**New Scorecard Name** - The full descriptive name of the scorecard. 255-character max

**Order** - The order in which the checkpoint will appear when the scorecard is displayed.

**Checkpoint Points** - The maximum point value of the checkpoint.

SCRIPT ID	SCRIPT NAME	ACTIVE	ADMIN GROUP	COLOR	MODIFY
CALLNOTES	Call Notes and Appointment Setting	Y	---ALL---		<a href="#">MODIFY</a>

**Figure 11. Scripts List**

## Dialer SCRIPTS

When you click on the SCRIPTS link on the left side menu bar of the admin screen you will enter the Scripts section. This starts with a full listing of every Dialer script in the system with their script ID, name and a link to the script modification page. We will first look at adding a new script.

### Add a New Script

You can get to the Add Script screen by clicking on the "ADD SCRIPT" link at the top of the SCRIPTS section. When adding a new script you must make sure that you set the script ID and script name or the submission will not be accepted. Also, please make sure that the script ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a script you will not be able to change that script ID unless you delete the script and re-create it again with a different script ID. You cannot have duplicate script IDs in the system, and script IDs must be between 2 and 10 characters in length.

In the scripts text section you can enter in specific flags to note that a field from the list should be populated in the script when it is displayed in the Dialer agent screen.

### Modify Script

*(screen shot of the Modify Script screen available in the Appendix)*

From the Script modification page you have the ability to click on the "Preview Script" link to see what your script will look like in the agent screen with the dynamic fields filled in with sample data.

**Script ID** - This is the short name of a Dialer Script. This needs to be a unique identifier. Do not to

use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

**Script Name** - This is the title of a Dialer Script. This is a short summary of the script. max 50 characters, minimum of 2 characters. There should be no spaces or punctuation of any kind in this field.

**Script Comments** - This is where you can place comments for a Dialer Script such as "changed to free upgrade on Sept 23". Maximum 255 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this script, and allows admin viewing only to the indicated user group. Default is --ALL-- which allows any admin user to view the script.

**Active** - This determines whether this script can be selected to be used by a campaign.

**Script Color** -This determines the background color of the script as displayed in the agent screen. default is white. If using an HTML-safe color name, be sure to make sure you spell it correctly. You can also use the -color chooser- to select a color.

**Script Text** - This is where you place the content of an agent screen Script. Minimum of 2 characters. You can have customer information be auto-populated in this script using --A--field--B-- where field is one of the following fieldnames: vendor\_lead\_code, source\_id, list\_id, gmt\_offset\_now, called\_since\_last\_reset, phone\_code, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, lead\_id, campaign, phone\_login, group, channel\_group, SQLdate, epoch, uniqueid, customer\_zap\_channel, server\_ip, SIPexten, session\_id, dialed\_number, dialed\_label, rank, owner, camp\_script, in\_script, script\_width, script\_height, recording\_filename, recording\_id, user\_custom\_one, user\_custom\_two, user\_custom\_three, user\_custom\_four, user\_custom\_five, preset\_number\_a, preset\_number\_b, preset\_number\_c, preset\_number\_d, preset\_number\_e, preset\_number\_f, preset\_dtmf\_a, preset\_dtmf\_b, did\_id, did\_extension, did\_pattern, did\_description, closecallid, xfercallid, agent\_log\_id, entry\_list\_id, call\_id, user\_group, called\_count, TABLEper\_call\_notes, MANUALDIALLINK, EMAILinbound\_message. For example, this sentence would print the persons name in it:

Hello, can I speak with <B>--A--first\_name--B---- A--last\_name--B-- please? Well hello --A--title--B-- --A--last\_name--B-- how are you today?

This would read----

Hello, can I speak with **John Doe** please? Well hello Mr. Doe how are you today?

You can also use an iframe to load a separate window within the SCRIPT tab, here is an example with prepopulated variables:

```
<iframe src="http://astguiclient.sf.net/test_Dialer_output.php?lead_id=--A--lead_id--B--&vendor_id=--A--vendor_lead_code--B--&list_id=--A--list_id--B--&gmt_offset_now=--A--gmt_offset_now--B--&phone_code=--A--phone_code--B--&phone_number=--A--phone_number--B--&title=--A--title--B--&first_name=--A--first_name--B--&middle_initial=--A--middle_initial--B--&last_name=--A--last_name--B--&address1=--A--address1--B--&address2=--A--address2--B--&address3=--A--address3--B--&city=--A--city--B--&state=--A--state--B--&province=--A--province--B--&postal_code=--A--postal_code--B--&country_code=--A--country_code--B--&gender=--A--gender--B--&date_of_birth=--A--date_of_birth--B--&alt_phone=--A--alt_phone--B--
```

```
&email=--A--email--B--&security_phrase=--A--security_phrase--B--&comments=--A--
comments--B--&user=--A--user--B--&campaign=--A--campaign--B--&phone_login=--A--
phone_login--B--&fronter=--A--fronter--B--&closer=--A--user--B--&group=--A--group--
B--&channel_group=--A--group--B--&SQLdate=--A--SQLdate--B--&epoch=--A--epoch--B--
&uniqueid=--A--uniqueid--B--&customer_zap_channel=--A--customer_zap_channel--B--
&server_ip=--A--server_ip--B--&SIPexten=--A--SIPexten--B--&session_id=--A--
session_id--B--&phone=--A--phone--B--" style="width:460;height:290;background-
color:transparent;" scrolling="auto" frameborder="0" allowtransparency="true"
id="popupFrame" name="popupFrame" width="460" height="290"> </iframe>
```

You can also use a special variable `IGNORENOSCROLL` to force scroll bars on the script tab even if you are using an `iframe` within it.

## Delete Script

If the option is enabled, a manager can go to the bottom of the script modification page and click on the "DELETE THIS SCRIPT" link to remove a script from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS SCRIPT" link to remove the script from the system.

ADMINISTRATION			
LEAD FILTER LISTINGS:			
FILTER ID	FILTER NAME	ADMIN GROUP	MODIFY
DROP72HOUR	UK 72 hour Drop No Call	---ALL---	MODIFY

**Figure 12. Filters List**

## Dialer FILTERS

Filters allow you to more finely select the leads that you want to call in your outbound dialing campaign and/or user. Within a filter you will use a small piece of a database language known as SQL (Structured Query Language) to fine tune your leads to dial from.

When you click on the FILTERS link on the left side menu bar of the admin screen you will enter the Filters section. This starts with a full listing of every Dialer filter in the system with their filter ID, name and a link to the filter modification page. We will first look at adding a new filter.

*It is very important before you enable a filter on a campaign or user, that you test it to confirm that there will still be leads available using the “TEST ON CAMPAIGN” feature on the Filter Modification page.*

### Add a New Filter

You can get to the Add Filter screen by clicking on the "ADD FILTER" link at the top of the FILTERS section. When adding a new filter you must make sure that you set the filter ID and filter name or the submission will not be accepted. Also, please make sure that the filter ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a filter you will not be able to change that filter ID unless you delete the filter and re-create it again with a different filter ID. You cannot have duplicate filter IDs in the system, and filter IDs must be between 2 and 10 characters in length.



## Modify Filter

*(screen shot of the Modify Filter screen available in the Appendix)*

From the Filter modification page you have the ability to click on the "Test On Campaign" form at the bottom of the page to preview how many leads in a specific campaign you can expect to be able to dial if this filter is enabled.

**Filter ID** - This is the short name of a Dialer Lead Filter. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

**Filter Name** - This is a more descriptive name of the Filter. This is a short summary of the filter. max 30 characters, minimum of 2 characters.

**Filter Comments** - This is where you can place comments for a Dialer Filter such as "calls all California leads". Maximum 255 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this filter, and allows admin viewing only to the indicated user group. Default is --ALL-- which allows any admin user to view the filter.

**Filter SQL** - This is where you place the SQL query fragment that you want to filter by. do not begin or end with an AND, that will be added by the hopper cron script automatically. Here are some example SQL queries that would work here:

```
called_count > 4 and called_count < 8
called_count IN('8','9','10','11')
state IN('NY','NJ')
```

## Delete Filter

If the option is enabled, a manager can go to the bottom of the filter modification page and click on the "DELETE THIS FILTER" link to remove a filter from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS FILTER" link to remove the filter from the system.

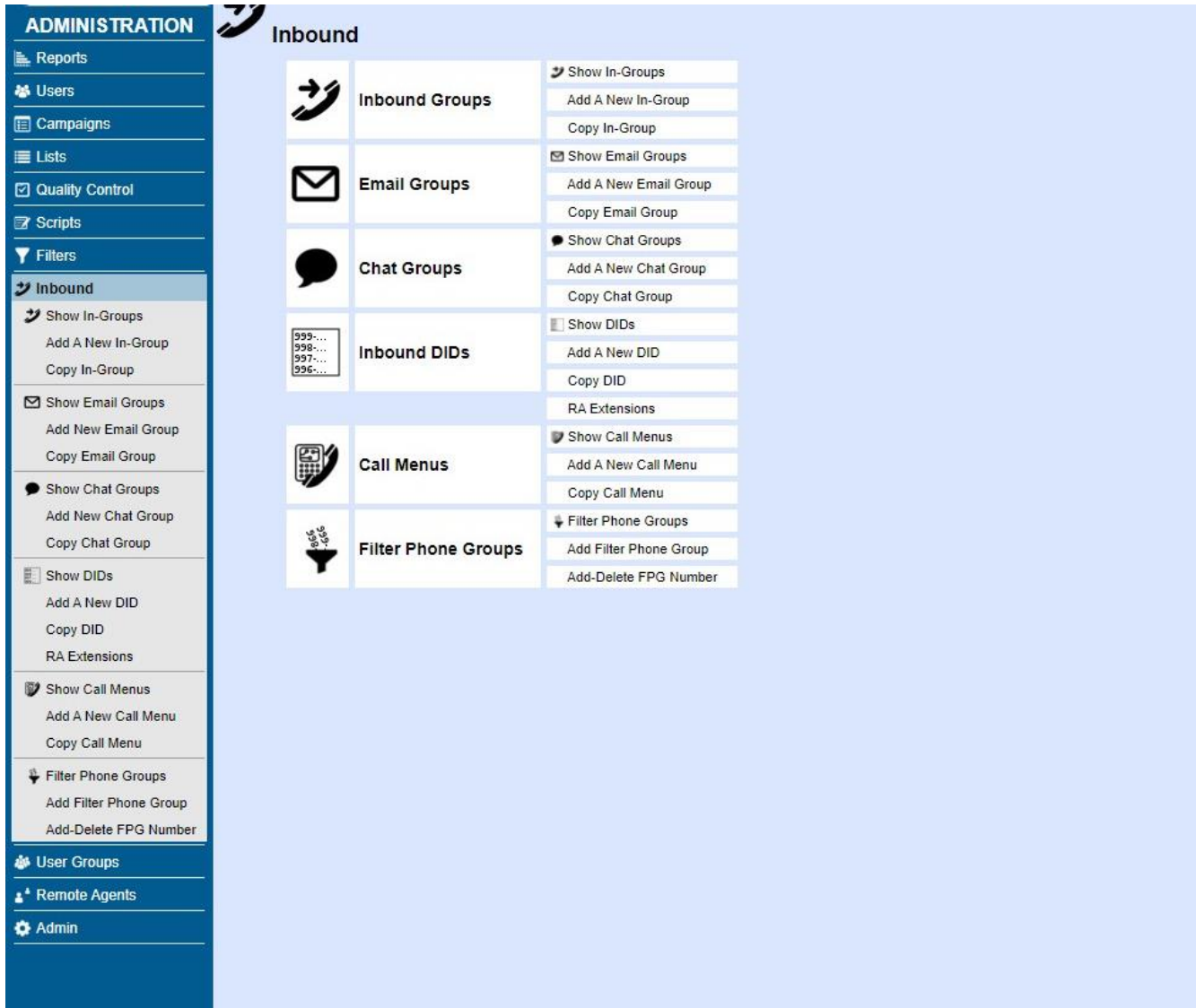


Figure 13. Inbound

## Inbound

The Inbound section contains configuration options for all of the incoming types of customer connections: In-Groups, Email Groups, Chat Groups, Inbound DIDs(phone number directed to your system), Call Menus(IVRs) and Filter Phone Groups.

ADMINISTRATION		INBOUND GROUP LISTINGS:						
IN-GROUP	NAME	PRIORITY	ACTIVE	ADMIN GROUP	TIME	COLOR	MODIFY	
215	215 exten xfer test	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
AGENT_11112	Agent 11112	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
AGENTDIRECT	Single Agent Direct Queue	99	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
AGENTDIRECT_63	Multiple testing	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
AGENTDIRECT1	AGENTDIRECT 1	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
AGENTDIRECTAPI	AGENTDIRECT API transfer	0	Y NA	ADMIN	24hours		<a href="#">MODIFY</a>	
AGENTDIRECTtest	Test	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
BCAST001_CID_IN	Union pin 20130812	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST002_CID_IN	CallerID BCAST002 inbound	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST003_CID_IN	CallerID BCAST003 inbound	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST004_CID_IN	CallerID BCAST004 inbound	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST005_CID_IN	CallerID BCAST005 inbound	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST006_CID_IN	Broadcast CID inbound 6	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST007_CID_IN	Broadcast CID inbound 7	0	N NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST008_CID_IN	Broadcast CID inbound 8	0	N	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
BCAST009_CID_IN	Broadcast CID inbound 9	0	N	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
callmenu	Call menu xfer	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST001_TRACK	CallerID BCAST001 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST002_TRACK	CallerID BCAST002 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST003_TRACK	CallerID BCAST003 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST004_TRACK	CallerID BCAST004 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST005_TRACK	CallerID BCAST004 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST006_TRACK	CallerID BCAST006 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST007_TRACK	CallerID BCAST007 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST008_TRACK	CallerID BCAST008 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_BCAST009_TRACK	CallerID BCAST009 tracking	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_INBOUND_TRACK	CallerID inbound tracking grou	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CID_INBOUND_TRACK2	CallerID inbound tracking 2	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
CMDROP	Callmenu drop	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
CONA_CID_INBOUND	CONA callerid inbound	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
DTMF_DROP	Drops to MULTI_DTMF CM	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
FEXTEL_AH_SUPPORT	Fextel support After Hours	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
FEXTEL_INBOUND	Fextel inbound	0	Y	--ALL--	9am-5pm		<a href="#">MODIFY</a>	
FEXTEL_SALES	Fextel sales calls	0	Y	--ALL--	9am-5pm		<a href="#">MODIFY</a>	
FEXTEL_SUPPORT2	Fextel support level 2	0	Y	--ALL--	9am-5pm		<a href="#">MODIFY</a>	
FEXTEL_VICHOST_SALE	Fextel Vichost Sales	0	Y	--ALL--	9am-5pm		<a href="#">MODIFY</a>	
goobersnootches	Stacey Test Group	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
GROUFR	GROUPE	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
MIKEGROUP	Mikes Testing	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
newtest	new test	0	N	--ALL--	9am-9pm		<a href="#">MODIFY</a>	
PBR_inbound	Budget Review CID in	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
RedFish	Red Fish	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
ringall	ringall	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
SBT_CID_INBOUND	Good Times CID Inbound	0	Y NA	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
SPP_IN_ELECTION_2	SPP inbound election 2	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
SPP_IN_ELECTION_3	SPP inbound election 3	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
SPP_IN_ELECTION_4	SPP inbound election 4	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
SPP_IN_ELECTION_5	SPP inbound election 5	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
SPP_IN_REP_PRIMARY	StPetePoll CID Lookup Rep Pri	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
STPETEPOLL_CID	StPetePoll CID Lookup	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	
studentloan	sale	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
studentloan1	overflow	0	Y NA	--ALL--	24hours		<a href="#">MODIFY</a>	
Support1	Support Level 1	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
test	test	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
TEST_INBOUND_DEV	Testing inbound dev CCC	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
test1234	test1234	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
TEST22	Test	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
tester	tester	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
testytest	test	0	Y	--ALL--	24hours		<a href="#">MODIFY</a>	
VSP_inbound	VSP_inbound	0	Y	--ALL--	ALL_CLOSED		<a href="#">MODIFY</a>	

Figure 14. Inbound In-Groups List

## Dialer INBOUND IN-GROUPS

In-groups allow you to set up many different groupings of inbound numbers(DIDs) and closer groups (to take calls from frontends on other Dialer campaigns). In order for inbound and closer calls to get to a Dialer agent you have to set up an In-group.

When you click on the IN-GROUPS link on the left side of the admin screen you will enter the In-groups section. This starts with a full listing of every Dialer inbound group in the system with their

in-group ID, name, ranking priority, active status, administrative group, call time, in-group display color and a link to the in-group modification page. We will first look at adding a new in-group.

NOTE: If you see a red "NA" in the ACTIVE column, that means the In-Group is not set as allowed in any campaigns.

## Add a New In-Group

You can get to the Add In-Group screen by clicking on the "ADD A NEW IN-GROUP" link at the top of the IN-GROUPS section. When adding a new in-group you must make sure that you set the in-group ID and in-group name or the submission will not be accepted. Also, please make sure that the in-group ID you have chosen does not have any spaces or wild card punctuation; only letters, numbers or underscores "\_" are permitted. Once you create a in-group you will not be able to change that in-group ID unless you delete the in-group and re-create it again with a different in-group ID. In-groups Ids must be unique, even from the Campaigns IDs. The in-group IDs must be between 2 and 20 characters in length.

## Copy An In-Group

This page will allow you to copy all of an existing in-group's settings into a new in-group. You just need to enter a new Group ID, Group name and a source In-Group to take the other settings from.

## Modify In-Group

*(screen shot of Modify In-Group screen available in the Appendix)*

**Group ID** - This is the short name of the inbound group, it is not editable after initial submission, must not contain any spaces and must be between 2 and 20 characters in length. The Group ID needs to be unique from other In-Group and Campaign IDs.

**Group Name** - This is the description of the group, it must be between 2 and 30 characters in length. Cannot include dashes, pluses or spaces .

**Group Color** - This is the color that displays in the Dialer client application when a call comes in on this group. It must be between 2 and 7 characters long. If this is a hex color definition you must remember to put a # at the beginning of the string or Dialer will not work properly. If using an HTML-safe color name, be sure to make sure you spell it correctly. You can also use the -color chooser- to select a color.

**Active** - This determines whether this group shows up in the selection box when a Dialer agent logs in.

**In-Group Calldate** - This is the last date and time that a call was directed to this inbound group.

**Admin User Group** - This is the administrative user group for this inbound group, this allows admin viewing of this in-group restricted by user group. Default is --ALL-- which allows any admin user to view this in-group.

**Web Form & Web Form 2/3** - This is the custom address that clicking on the WEB FORM button in Dialer will take you to for calls that come in on this group. The “web form” address can use custom variables just like the Script functionality. To activate custom variables in the web form you just need to put “VAR” at the front of the URL, for example:

VARhttp://www.website.com/search.php?phone==A--phone\_number--B--

If you will be adding an agent WEB VAR to the web form you can do so using --A--web\_var--B--. in the following example the agent variable is used to log the agent into an HTTP-authenticated website without prompting them for a username and password. The WEB VAR used is “[test@pass](#)” and the web form string that you would put in would look something like this:

VARhttp://--A--web\_var--B--www.website.com/search.php?phone===A--phone\_number--B--

The agent web variables can be set per campaign and per in-group in the Modify User section for each user.

**Next Agent Call** - This determines which available agent will receive the next call:

- random: orders by the random update value in the Dialer \_live\_agents table
- oldest\_call\_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
- oldest\_call\_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
- oldest\_inbound\_call\_start: orders by the last time an agent was sent an inbound call. Results in agents receiving about the same number of calls overall.
- oldest\_inbound\_call\_finish: orders by the last time an agent finished an inbound call. AKA agent waiting longest receives first call.
- overall\_user\_level: orders by the user\_level of the agent as defined in the Dialer \_users table a higher user\_level will receive more calls.
- inbound\_group\_rank: orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
- campaign\_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
- ingroup\_grade\_random: orders based on probability of the available agent's assigned grades for this ingroup.
- campaign\_grade\_random: orders based on probability of the available agent's assigned grades for this campaign.
- fewest\_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- fewest\_calls\_campaign: orders by the number of calls received by an agent for the campaign. Least calls first.
- longest\_wait\_time: orders by the amount of time agent has been actively waiting for a call.
- ring\_all: rings all available agents until one picks up the phone.
- oldest\_inbound\_filtered\_call\_start: orders by the last time an agent was sent an inbound call that was not of a filtered-out status, in-group or length.
- oldest\_inbound\_filtered\_call\_finish: orders by the last time an agent finished an inbound call that was not of a filtered-out status, in-group or length.
- overall\_user\_level\_wait\_time: same as overall\_user\_level except will use longest waiting as secondary order.
- campaign\_rank\_wait\_time: same as campaign\_rank except will use longest waiting as secondary order.
- fewest\_calls\_wait\_time: same as fewest\_calls except will use longest waiting as secondary order.
- fewest\_calls\_campaign\_wait\_time: same as fewest\_calls\_campaign except will use longest waiting

as secondary order.

- `inbound_group_rank_wait_time`: same as `inbound_group_rank` except will use longest waiting as secondary order.

**On-Hook CID** - This option is only used for agents that are logged in with phones that have the agent-on-hook feature enabled. This is the caller ID that will show up on their agent phones when the calls are ringing. `GENERIC` is a generic `RINGAGENT00000000001` type of notification. `INGROUP` will show only the in-group the call came from. `CUSTOMER_PHONE` will show only the customer phone number. `CUSTOMER_PHONE_RINGAGENT` will show `RINGAGENT_3125551212` with the `RINGAGENT` as part of the CID with the customer phone number. `CUSTOMER_PHONE_INGROUP` will show the first 10 characters of the in-group followed by the customer phone number. Default is `GENERIC`. If you are using Asterisk 13 or higher, only the `RINGAGENT` options will work properly. `CUSTOMER_PHONE_RINGAGENT` will show `RINGAGENT_3125551212` with the `RINGAGENT` as part of the CID a long with the customer phone number. `CUSTOMER_PHONE_INGROUP` will show the first 10 characters of the in-group followed by the customer phone number. Default is `CUSTOMER_PHONE_RINGAGENT`. If you are using Asterisk 13 or higher, only the `RINGAGENT` options will work properly.

**On-Hook CID Number** - This option allows you to set a CID Number to be sent out with the On-Hook CID. If you put a `Y`, `YES` or `CUSTOMER` in this field, then the customer CID number will be sent to the ringing agent phone. If you put a different phone number, that number will be sent. Default is blank for disabled.

**Agent Search Method Override** - This setting will allow you to override the dialplan agent search method and force one only for this inbound group. `LB` will search for the next agent on any server to send the answered call to. `SO` will only search on the originating server for an agent to send the answered call to. Default is blank for disabled. **WARNING**, setting this to `-SO-` can result in a much higher number of dropped calls.

**Queue Priority** - This setting is used to define the order in which the calls from this inbound group should be answered in relation to calls from other inbound groups.

**Fronter Display** - This determines whether the inbound Dialer agent would have the fronter agent's name, if there is one, displayed in the Status field when the call comes to the agent.

**Script** - This menu allows you to choose the script that will appear on the agents' screens for this campaign. Select `NONE` to leave the agent's script tab blank.

**Ignore List Script Override**- This option allows you to ignore the list ID Script Override option for calls coming into this In-Group. Setting this to `Y` will ignore any List ID script settings. Default is `N`.

**Status Group Override** -If this field is set, this Status Group will be used instead of the campaign statuses for calls handled by agents from this inbound group. This does not affect System Statuses which will always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Get Call Launch** - This menu allows you to choose whether you want to auto-launch either of the web-form pages in a separate window, auto-switch to the `SCRIPT` or `FORM` tabs, or do nothing when

a call is sent to the agent for this campaign.

**Agent Browser Call Alert Sound** - This option will override the same campaign setting for calls from this inbound group, if not set to ---DISABLED---. Default is ---DISABLED---.

**Group Handling** -This menu allows you to choose what type of inbound activity this group should handle. PHONE means this in-group is for handling phone calls and will show under the In-Group section. EMAIL is for handling incoming emails and will cause the group to be listed under the Email Group section. CHAT is for handling customer chats and will cause the group to be listed under the Email Group section

**Answer Signal** - If set to START, an Answer signal will be sent to the call as soon as it arrives in the In-Group. If set to ROUTE, an Answer signal will be sent to the call when it is routed away from the In-Group. If set to NONE, no Answer signal will be sent. Default is START.

**Transfer-Conf DTMF** - These seven fields allow for you to have two sets of Transfer Conference and DTMF presets and three additional number presets. When the call or campaign is loaded, the Dialer Agent Screen will show five links on the transfer-conference frame("D1" through "D5") and auto-populate the number-to-dial and the send-dtmf fields when the links are clicked on. If you want to allow Blind transfers of customers to a Dialer AGI script for logging or an IVR, then place AXFER in the number-to-dial field. You can also specify a custom extension after the AXFER, for instance if you want to do Custom AGI IVR script you would put AXFER82904 in the number-to-dial field(assuming that \_82904. is in your dialplan). Consultative transfers no longer need to use the CXFER prefix now that there is a CONSULTATIVE checkbox option on the Agent screen.

**Timer Action** - This feature allows you to trigger actions after a certain amount of time. the D1 and D2 DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE\_ONLY will simply display the message that is in the field below. NONE will disable this feature and is the default. This setting will override the Campaign settings. HANGUP will hang up the call when the timer is triggered, CALLMENU will send the call to the Call Menu specified in the Timer Action Destination field, EXTENSION will send the call to the Extension that is specified in the Timer Action Destination field, IN\_GROUP will send the call to the In-Group specified in the Timer Action Destination field.

**Timer Action Message** - This is the message that appears on the agent screen at the time the Timer Action is triggered.

**Timer Action Seconds** - This is the amount of time after the call is connected to the customer that the Timer Action is triggered. Default is -1 which is also inactive.

**Timer Action Destination** - This field indicates the Call Menu, Extension or In-Group the call will sent to, if the Time Action is set to CALLMENU, EXTENSION or IN\_GROUP. Default is empty.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the call is considered a DROP and routes the call to the Drop Action (listed below).

**Drop Seconds Override Container** - This setting will allow you to override the In-Group Drop

Seconds setting based upon the day-of-the-week and the time-of-day. In a WEEKDAY\_TIMERANGE\_SECONDS Settings Container you can set multiple lines of overrides, one per line, for this In-Group using the following format with each field separated by commas, day-of-week,start-time,end-time,drop-seconds-override

The day-of-week can be a single day, MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY or it can be set to ALLDAYS for all 7 days a week.

The start-time and end-time both need to each be set to a four-digit time, based on 24-hour time, such as 1700 for 5:00pm server time.

The drop-seconds-override needs to be a number of seconds.

For example, if you have a line like the following,

MONDAY,0900,0930,300

Then on Mondays only from 9:00am to 9:30am, the Drop Seconds will be 300 seconds instead of what it is set to in the In-Group Drop Seconds setting.

NOTE, if there is more than one entry that will match the day and time, the last one in the settings container will be the one that is used.

Here is an example DROP\_SECONDS\_OVERRIDE Settings Container entry,

```
;day-of-week,start-time,end-time,drop-seconds-override  
ALLDAYS,1200,1300,600  
MONDAY,0900,0930,300  
FRIDAY,1515,1700,900  
FRIDAY,1725,1730,60
```

**Drop Action** – Routes the customer call after it reaches the Drop Call Seconds (time limit) for the In-group. HANGUP will simply hang up the call, MESSAGE will send the call the Drop Exten that you have defined below, VOICEMAIL will send the call to the voicemail box that you have defined below, IN\_GROUP will send the call to the Inbound Group that is defined below, and CALLMENU will route to the menu indicated in the “Drop Call Menu” field. VMAIL\_NO\_INST will send the call to the voicemail box that you have defined below and will not play instructions after the voicemail message.

**Drop Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when the call is dropped and sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Drop Exten** - If Drop Action is set to MESSAGE, this is the dial plan extension that the call will be sent to if it reaches Drop Call Seconds.

**Voicemail** - If Drop Action is set to VOICEMAIL, the call DROP would instead be directed to this voicemail box to hear and leave a message. In an AGENTDIRECT in-group, setting this to AGENTVMAIL will select the User voicemail ID to use.

**Drop Transfer Group** - If Drop Action is set to IN\_GROUP, the call will be sent to this inbound group if it reaches Drop Call Seconds.

**Drop Call Menu** - If Drop Action is set to CALLMENU, the call will be sent to this call menu if it reaches Drop Call Seconds.

**Call Time** - This is the call time scheme to use for this inbound group. Keep in mind that the time is based on the server time. Default is 24hours. See the Call Times Admin section for more information.



Directly below this option, you will see a count of how many Holiday entries are defined for the Call Time that is selected for this In-Group.

**Action Transfer CID** - Used for Drop, After-hours and No-agent-no-queue actions. This is the caller ID number that the call uses before it is transferred to extensions, messages, voicemail or call menus. You can use CUSTOMER in this field to use the customer phone number, or CAMPAIGN to use the first allowed campaign caller id number. If this is a call that will go to a Call Menu and then back to an in-group, we suggest you use CUSTOMERCLOSER in this field, and also you need to set the In-Group Search Method in the Call Menu to CLOSER. Default is CUSTOMER.

**After Hours Action** - The action to perform if it is after hours as defined in the call time for this inbound group. HANGUP will immediately hangup the call, MESSAGE will play the file in the After Hours Message Filename field, EXTENSION will send the call to the After Hours Extension in the dialplan and VOICEMAIL will send the call to the voicemail box listed in the After Hours Voicemail field, IN\_GROUP will send the call to the inbound group selected in the After Hours Transfer Group, and CALLMENU will route to the menu indicated in the “After Hours Call Menu” field.. Default is MESSAGE. VMAIL\_NO\_INST will send the call to the voicemail box that you have defined below and will not play instructions after the voicemail message.

**After Hours Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when the call is after hours and sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**After Hours Message Filename** - The audio file located on the server to be played if the Action is set to MESSAGE. Default is vm-goodbye

**After Hours Extension** - The dialplan extension to send the call to if the Action is set to EXTENSION. Default is 8300.

**After Hours Voicemail** - The voicemail box to send the call to if the Action is set to VOICEMAIL.

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**After Hours Transfer Group** - If After Hours Action is set to IN\_GROUP, the call will be sent to this inbound group if it enters the in-group outside of the call time scheme defined for the in-group.

**After Hours Call Menu** - If After Hours Action is set to CALLMENU, the call will be sent to this Call Menu if it enters the in-group outside of the call time scheme defined for the in-group.

**No Agents No Queueing** – If this field is set to Y, NO\_READY or NO\_PAUSED then no calls will be put into the queue for this in-group if there are no agents logged in and the calls will go to the No Agent No Queue Action. The NO\_PAUSED option will also not send the callers into the queue if there are only paused agents in the in-group. The NO\_READY option will also not send the callers into the queue if there are no agents ready to take the call in the in-group. Default is N. In an AGENTDIRECT in-group, setting this to AGENTVMAIL will select the User voicemail ID to use. You can also put AGENTTEXT in this field if it is set to EXTENSION and the system will look up the user custom five field and send the call to that dialplan number. If set to N, the calls will queue up, even if there are no agents logged in and set to take calls from this in-group.

**No Agent No Queue Action** - If No Agent No Queue is enabled, then this field defines where the call

will go if there are no agents in the In-Group. Default is MESSAGE, this plays the sound files in the Action Value field and then hangs up. Depending on the “No Agent No Queue Action” selected, a complimentary routing field will appear below to indicate where the call should be sent.

**No Agent No Queue Delay** - The number of seconds after the call arrives in the In-Group before the No Agent No Queue checking process will run. Default is 0 seconds.

**No Agent No Queue Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when No agent no queue is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Areacode Filter** - This feature allows you to filter calls that have been waiting in queue by the areacode of the customer phone number. The areacodes are defined on a per In-Group basis using the Areacode List modification page that you can get to by clicking on the areacode filter list link to the right. The ALLOW\_ONLY option will only allow those customer phone numbers that begin with the areacodes included in the areacode filter list to continue waiting in the queue. The DROP\_ONLY option will only drop those customer phone numbers that begin with the areacodes included in the areacode filter list. Areacodes in the filter list can be from 1 to 6 digits in length. Default is DISABLED.

**Areacode Filter Seconds** - If the Areacode Filter feature above is enabled, then this field is where you set the number of seconds waiting in the queue that the feature is executed. Default is 10 seconds.

**Areacode Filter Action** - If the Areacode Filter feature above is enabled, this is the action taken on the phone call as it is dropped out of this in-group. Default is MESSAGE.

**In-Queue No Agents Check** - If this field is set to Y, NO\_READY, NO\_PAUSED\_EXCEPTIONS or NO\_PAUSED then while calls are in the queue waiting for an agent, the system will check for available agents, and if there are no agents logged in the calls will go to the No Agent No Queue Action. The NO\_PAUSED option will also not keep the callers in the queue if there are only paused agents in the in-group. The NO\_PAUSED\_EXCEPTIONS option will also not keep the callers in the queue if there are only paused agents in the in-group with the pause codes that appear in the selected list of pause codes. The NO\_READY option will also not keep the callers in the queue if there are no agents ready to take the call in the in-group. Default is N. For details on where the calls will be sent, see the No Agent No Queue Action section above.

**In-Queue No Agents Pause Exceptions** - If the In-Queue No Agents Check setting above is set to NO\_PAUSED\_EXCEPTIONS, then this is where you select the Settings Container, of the PAUSE\_CODES\_LIST container type, that will have the list of pause codes, one per line, that will be used to match against in determining whether to allow calls to stay in that in-group queue or not. Default is -blank-.

**Max Calls Method** - allows for a cap on concurrent calls being handled by each in-group, either in total or per queue.

**Max Calls Count** – This option must be set higher than 0 if you want to use the Max Calls Method feature. Default is 0.

**Max Calls Action** - The action taken when the Max Calls Method is enabled and the number of calls exceeds the Max Calls Count setting. Calls above that amount will either be sent to either the DROP action, the AFTERHOURS action, or the NO\_AGENT\_NO\_QUEUE action. Calls will be logged as a MAXCAL status with a MAXCALLS hangup reason. Default is NO\_AGENT\_NO\_QUEUE.

**Welcome Message Filename** - The audio file located on the server to be played when the call comes in. If set to ---NONE--- then no message will be played. Default is ---NONE---. It is important to note that the customer phone call will not actually enter the queue to be sent to an agent until after this message has been played. If you want to avoid this, consider instead putting a welcome message at the beginning of the Music on Hold that you have defined for this In-Group.

**Play Welcome Message** - These settings select when to play the defined welcome message, ALWAYS will play it every time, NEVER will never play it, IF\_WAIT\_ONLY will only play the welcome message if the call does not immediately go to an agent, and YES\_UNLESS\_NODELAY will always play the welcome message unless the NO\_DELAY setting is enabled. Default is ALWAYS.

**Music On Hold Context** - The music on hold context to use when the customer is placed on hold. Default is default. You can select, from the “moh chooser”, one of the music on hold contexts that are in your Admin → Music On Hold listings.

**On Hold Prompt Filename** - The audio file located on the server to be played at a regular interval when the customer is on hold. Default is generic\_hold. This audio file MUST be 9 seconds or less in length. We usually recommend that you put any message that you want a customer to hear into a Music On Hold context instead of using an On-Hold Prompt. This is because while the On Hold Prompt is playing, the customer cannot be sent to an agent, unlike with Music On Hold, which can be interrupted to send a customer to an agent.

**On Hold Prompt Interval** - The length of time in seconds to wait before playing the on hold prompt. Default is 60.

**On Hold Prompt No Block** - Setting this option to Y will allow calls in line behind a call where the on hold prompt is playing to go to an agent if one becomes available while the message is playing. While the On Hold Prompt Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**On Hold Prompt Seconds** - This field needs to be set to the number of seconds that the On Hold Prompt Filename plays for. This audio file MUST be 9 seconds or less in length. Default is 9. It is important that this value is set to the actual length of the On-Hold Prompt, and is not greater than the length of that prompt.

**Play Place in Line** - This defines whether the caller will hear their place in line when they enter the queue as well as when they hear the announcement. Default is N.

**Place in Line Caller Number** - If the Play Place in Line feature is enabled, this option defines the audio prompt played when the customer hears what place they are in line -you are currently caller number-. Default is -queue-thereare-.

**Place in Line You Are Next Filename** - If the Play Place in Line feature is enabled, this option

defines the audio prompt played when the customer hears that they are next in line -your call is now first in line-. Default is -queue-youarenext-.

**Play Estimated Hold Time** - This defines whether the caller will hear the estimated hold time before they are transferred to an agent. Default is N.

**Calculate Estimated Hold Seconds** - This defines the number of seconds into the queue that the customer will wait before the Estimated Hold Time will be calculated and optionally played. Minimum is 3 seconds, even if set lower than 3. Default is 0.

**Estimated Hold Time Minimum Filename** - If the Estimated Hold Time is active and it is calculated to be at or below the minimum of 15 seconds, then this prompt file will be played instead of the default announcement. Default is Empty for inactive.

**Estimated Hold Time Minimum Prompt No Block** - If Estimated Hold Time is active and the Estimated Hold Time Minimum Filename field above is filled-in, then this option to allow calls in line behind a call where the prompt is playing to go to an agent if one becomes available while the message is playing. While the prompt is playing to a customer they cannot be sent to an agent. Default is N.

**Estimated Hold Time Minimum Prompt Seconds** - This field needs to be set to the number of seconds that the Estimated Hold Time Minimum Filename prompt plays for. Default is 10.

**Wait Time Option** - This allows you to give customers options to leave the queue if their wait time exceeds the amount of seconds specified below. Default is NONE. If one of the PRESS\_ options is selected, it will play the Press Filename defined below and give the customer the option to press 1 on their phone to leave the queue and run the selected option. The PRESS\_STAY option will send the customer back to the queue without losing their place in line. The PRESS\_CALLBACK\_QUEUE option will preserve the caller place in line and will call the customer back when their place is the next one to go to an agent, this inbound callback queue entry will last until the call is placed back to the customer or as long as the Callback Queue Expire Hours setting below.

**Wait Time Second Option** - Same as the first Wait Time Option field above, except this one will check for the customer pressing the 2 key. Default is NONE. If no first Wait Time Option is selected then this option will not be offered.

**Wait Time Third Option** - Same as the first Wait Time Option field above, except this one will check for the customer pressing the 3 key. Default is NONE. If no Second Wait Time Option is selected then this option will not be offered.

**Wait Time Option Seconds** - If Wait Time Option is set to anything but NONE, this is the number of seconds that the customer has been waiting in queue that will trigger the wait time options. Default is 120 seconds. It is recommended that this not be set to less time than it takes to play any welcome messages that have been defined for this In-Group.

**Wait Time Option Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when the Wait Time Option is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Wait Time Option Extension** - If Wait Time Option is set to PRESS\_EXTEN, this is the dialplan extension that the call will be sent to if the customer presses the option key when presented with the option. For AGENTDIRECT in-groups, you can put AGENTTEXT in this field and the system will look up the user custom five field and send the call to that dialplan number.

**Wait Time Option Callmenu** - If Wait Time Option is set to PRESS\_CALLMENU, this is the Call Menu that the call will be sent to if the customer presses the option key when presented with the option.

**Wait Time Option Voicemail** - If Wait Time Option is set to PRESS\_VMAIL, this is the voicemail box that the call will be sent to if the customer presses the option key when presented with the option. In an AGENTDIRECT in-group, setting this to AGENTVMAIL will select the User voicemail ID to use.

**Wait Time Option Transfer In-Group** - If Wait Time Option is set to PRESS\_INGROUP, this is the inbound group that the call will be sent to if the customer presses the option key when presented with the option.

**Wait Time Option Press Filename** - If Wait Time Option is set to one of the PRESS\_ options, this is the filename prompt that is played if the customer wait time exceeds the Wait Time Option Seconds to give the customer the option to press 1, 2 or 3 on their phone to run the selected Wait Time Press options. It is very important that you include options in the audio file for all of your selected Wait Time Options, and that the audio file length in seconds is properly defined in the Filename Seconds field below; or there will be problems. Default is to-be-called-back.

**Wait Time Option Press No Block** - Setting this option to Y will allow calls in line behind a call where the Wait Time Option Press Filename prompt is playing to go to an agent, if one becomes available while the message is playing. While the Wait Time Option Press Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**Wait Time Option Press Filename Seconds** - This field needs to be set to the number of seconds that the Wait Time Option Press Filename plays for. Default is 10.

**Wait Time Option After Press Filename** - If Wait Time Option is set to one of the PRESS\_ options, this is the filename prompt that is played after the customer has pressed 1, 2 or 3.

**Wait Time Option Callback List ID** - If Wait Time Option is set to PRESS\_CID\_CALLBACK, this is the List ID the call is added to as a new lead if the customer presses the option key when presented with the option.

**Wait Hold Option Priority** - If both Estimated Hold Time options and Wait Time options are active, this setting will define whether one, the other or both of these features are active. For example, if the Estimated Hold Time Option is set to 360, the Wait Time option is set to 120 and the customer has been waiting for 120 seconds and there are still 400 seconds estimated hold time, then they are both active at the same time and this setting will be checked to see what options will be offered. Default is WAIT only.

**Estimated Hold Time Option** - This allows you to specify the routing of the call if the estimated hold time is over the amount of seconds specified below. Default is NONE. If one of the PRESS\_ options is

selected, it will play the Press Filename defined below and give the customer the option to press 1 on their phone to leave the queue and run the selected option. The PRESS\_CALLBACK\_QUEUE option will preserve the caller place in line and will call the customer back when their place is the next one to go to an agent, this inbound callback queue entry will last until the call is placed back to the customer or as long as the Callback Queue Expire Hours setting below.

**Hold Time Second Option** - Same as the first Hold Time Option field above, except this one will check for the customer pressing the 2 key. Default is NONE. If no first Hold Time Option is selected, then this option will not be offered.

**Hold Time Third Option** - Same as the first Hold Time Option field above, except this one will check for the customer pressing the 3 key. Default is NONE. If no Second Hold Time Option is selected then this option will not be offered.

**Hold Time Option Seconds** - If Hold Time Option is set to anything but NONE, this is the number of seconds of estimated hold time that will trigger the hold time option. Default is 360 seconds.

**Hold Time Option Lead Reset** - This option if set to Y, will set the lead called-since-last-reset field to N when the Hold Time Option is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Hold Time Option Minimum** - If Hold Time Option enabled, this is the minimum number of seconds the call must be waiting before it will be presented with the hold time option. The hold time option will immediately be presented at this time if the estimated hold time is greater than the Hold Time Option Seconds value. Default is 0 seconds.

**Hold Time Option Extension** - If Hold Time Option is set to EXTENSION, this is the dialplan extension that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Callmenu** - If Hold Time Option is set to CALL\_MENU, this is the Call Menu that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Voicemail** - If Hold Time Option is set to VOICEMAIL, this is the voicemail box that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Transfer In-Group** - If Hold Time Option is set to IN\_GROUP, this is the inbound group that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Callback Filename** - If Hold Time Option is set to CALLERID\_CALLBACK, this is the filename prompt that is played before the call is logged as a new lead to the list ID specified below if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Press No Block** - Setting this option to Y will allow calls in line behind a call where the Hold Time Option Press Filename prompt is playing to go to an agent if one becomes available while the message is playing. While the Hold Time Option Press Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**Hold Time Option Press Filename Seconds** - This indicates the length of the Hold Time Option Message to Dialer . This fields should be set to the number of seconds that the Hold Time Option Press Filename plays for. Default is 10.

**Hold Time Option After Press Filename** - If Hold Time Option is set to one of the PRESS\_ options or CALLERID\_CALLBACK, this is the filename prompt that is played after the customer has pressed 1 or the call has been added to the callback list.

**Hold Time Option Callback List ID** - If Hold Time Option is set to CALLERID\_CALLBACK, this is the List ID the call is added to as a new lead if the estimated hold time exceeds the Hold Time Option Seconds.

**Callback Queue Expire Hours** - If a Hold Time or Wait Time Option is set to PRESS\_CALLBACK\_QUEUE, this is the maximum number of hours that an entry can stay in the inbound callback queue before it is removed without dialing it. Default is 96 hours.

**Callback Queue Call Time** - For any inbound callback queue outbound calls to be placed, this is the local call time used to determine if the number can be dialed right now or not.

**Callback Queue Dial Filter** - This option allows you to remove DNC numbers from your Callback Queue. You can use any combination of: Internal DNC List, Campaign DNC List tied to campaign of the list where the lead is, and Areacode DNC wildcard.

**CID Callback Number Validation** - If this option is enabled, the Caller ID Number of the customer will be checked for valid length, and optionally checked against a Filter Phone Group to determine if it is valid. This option will also play back the phone number to the customer and ask them to confirm that they want to use this number to be called back at. The customer will also have the option of entering in a different phone number to be called back at. The ONLY\_IF\_INVALID option will not ask the customer to confirm if the Caller ID number is valid. Default is NO for disabled.

**CID Callback Number Invalid Filter Phone Group** - If CID Callback Number Validation is enabled, then this optional setting will check to see if the customer Caller ID Number is in the selected Filter Phone Group, and if it is the number will be considered invalid and the customer will be asked to enter in a phone number to be called back at. Default is empty, for disabled.

**CID Callback Number Length** - If CID Callback Number Validation is enabled, then this setting is where the length of a valid Caller ID number is input. You can enter more than one length number by separating them with a dash, so 10-11 would consider both ten and eleven digits to be valid Caller ID phone numbers. Default is 10.

**CID Callback Number Valid Filename** - This is the audio prompt or prompts that the customer will hear if CID Callback Number Validation is set to YES and they have a valid Caller ID phone number. You can optionally have multiple prompts in this setting separated by a pipe character, and you can also optionally have the phone number spoken by using --PHONE-- as a part of the value for this setting. An example script for this audio prompt might look something like this - To receive a call back on this number 9876543210, please press 1, or press 2 if you want us to call you back on a different number. - Default is blank, for disabled.

**CID Callback Number Confirmed Filename** - This is the audio prompt or prompts that the customer will hear if they have confirmed the phone number that they are to be called back on. You can optionally have multiple prompts in this setting separated by a pipe character, and you can also optionally have the phone number spoken by using --PHONE-- as a part of the value for this setting. An example script for this audio prompt might look something like this - That is great, we will keep your place in the queue and call you back on 9876543210 as soon as one of our team members is available. Thank you for calling. - Default is blank.

**CID Callback Number Enter Filename** - This is the audio prompt that the customer will hear when they have been asked to enter the phone number that they want to be called back on. An example script for this audio prompt might look something like this - Using the keypad on your telephone, please enter the number you wish to be called back on including local area code or full mobile number followed by the pound key. - Default is blank.

**CID Callback Number You Entered Filename** - This is the audio prompt that the customer will hear immediately after they have entered the phone number that they want to be called back on. An example script for this audio prompt might look something like this - Thanks, you have entered - Default is blank.

**CID Callback Number Confirm Filename** - This is the audio prompt that the customer will hear after the CID Callback Number You Entered Filename prompt and the number they have entered have both played after they have entered the phone number that they want to be called back on. An example script for this audio prompt might look something like this - Please press 1 to confirm this number or press 2 if this is incorrect and to enter the number again. - Default is blank.

**CID Callback Number Invalid Filename** - This is the audio prompt that the customer will hear if they have entered an invalid phone number to be called back at. After this prompt plays, the customer will be sent back to the CID Callback Number Enter Filename prompt. After entering an invalid number 2 times, the customer will be sent to the CID Callback Number Error prompt mentioned below. An example script for this audio prompt might look something like this - We are sorry but we cannot recognize the number that you have entered. - Default is blank.

**CID Callback Number Reenter Filename** - This is the audio prompt that the customer will hear if they have entered in a phone number but pressed 2 to not confirm the number they just entered. After this prompt plays, the customer will be sent back to the CID Callback Number Enter Filename prompt. An example script for this audio prompt might look something like this - Okay, lets try again. - Default is blank.

**CID Callback Number Error Filename** - This is the audio prompt that the customer will hear if they have entered in an invalid phone number twice. After this prompt plays, the customer will be sent back to queue. An example script for this audio prompt might look something like this - It looks like we are having some difficulty, so please hold and we will transfer you to one of our team members as soon as possible. - Default is blank.

**Closing Time Action** - This allows you to specify the routing of the call if the closing time of the in-group is reached while the call is still waiting for an agent, Closing time is the end of the Call Time that is defined for this in-group. Default is DISABLED. If one of the PRESS\_ options is selected, it will play the Press Filename defined below and give the customer the option to press 1 on their phone to



leave the queue and run the selected option. The `PRESS_CALLBACK_QUEUE` option will preserve the caller place in line and will call the customer back when their place is the next one to go to an agent, this inbound callback queue entry will last until the call is placed back to the customer or as long as the `Callback Queue Expire Hours` setting above.

**Closing Time Now Trigger** - If Closing Time Action is enabled, this flag allows you to send all customers waiting in the queue to the Closing Time Action as defined above, before the actual closing time is reached for the day.

**Closing Time Press Filename** - If Closing Time Option is set to one of the `PRESS_` options, this is the filename prompt that is played if the in-group has reached the closing time for the day. It is very important that this audio file is 10 seconds or less or there will be problems.

**Closing Time End Filename** - If Closing Time Option is set to one of the `PRESS_` options or `PRESS_CID_CALLBACK` or `PRESS_CALLBACK_QUEUE`, this is the filename prompt that is played after the customer has pressed 1 or the call has been added to the callback list or queue.

**Closing Time Option Lead Reset** - This option if set to Y, will set the lead called-since-last-reset field to N when the Closing Time Option is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Closing Time Option Extension** - If Closing Time Option is set to `EXTENSION`, this is the dialplan extension that the call will be sent to if the Closing Time is reached. For `AGENTDIRECT` in-groups, you can put `AGENTTEXT` in this field and the system will look up the user custom five field and send the call to that dialplan number.

**Closing Time Option Callmenu** - If Closing Time Option is set to `CALL_MENU`, this is the Call Menu that the call will be sent to if the Closing Time is reached.

**Closing Time Option Voicemail** - If Closing Time Option is set to `VOICEMAIL`, this is the voicemail box that the call will be sent to if the Closing Time is reached. In an `AGENTDIRECT` in-group, setting this to `AGENTVMAIL` will select the User voicemail ID to use.

**Closing Time Option Transfer In-Group** - If Closing Time Option is set to `IN_GROUP`, this is the inbound group that the call will be sent to if the Closing Time is reached.

**Closing Time Option Callback List ID** - If Closing Time Option is set to `CALLERID_CALLBACK`, this is the List ID the call is added to as a new lead if the Closing Time is reached.

**Agent Alert Filename** - The audio file to play to an agent to announce that a call is coming to the agent. To not use this function set this to X. Default is ding.

**Agent Alert Delay** - The length of time in milliseconds to wait before sending the call to the agent after playing the on Agent Alert Extension. Default is 1000.

**Default Transfer Group** - This field is the default In-Group that will be automatically selected when the agent goes to the transfer-conference frame in their agent interface.

**Default Group Alias** - If you have allowed Group Aliases for the campaign, then this is the group alias that is selected first by default on a call coming in from this inbound group when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

**Dial In-Group CID** - If the agent campaign allows for Manual In-Group Dialing, the contents of this field (if populated) will be sent as the outgoing CID of the phone call, overriding the campaign settings and list CID override setting. Default is empty.

**Hold Recall Transfer In-Group** - If a customer calls back to this in-group more than once and this is not set to NONE, then the call will automatically be sent on to the In-Group selected in this field. Default is NONE.

**No Delay Call Route** - Setting this to Y will remove all wait times and audio prompts, attempt to send the call right to an agent. Does not override welcome message or on hold prompt settings. Default is N.

**In-Group Recording Override** - This field allows for the overriding of the campaign call recording setting. This setting can be overridden by the Dialer \_user recording override setting. DISABLED will not override the campaign recording setting. NEVER will disable recording on the client. ONDEMAND is the default and allows the agent to start and stop recording as needed. ALLCALLS will start recording on the client whenever a call is sent to an agent. ALLFORCE will start recording on the client whenever a call is sent to an agent giving the agent no option to stop recording.

**In-Group Recording Filename** - This field will override the Campaign Recording Filenaming Scheme unless it is set to NONE. The allowed variables are CAMPAIGN INGROUP CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID CALLID RECID. If your dialers have --POST recording processing enabled, you can also use POSTVLC POSTSP POSTARRD3 POSTSTATUS. These POST options will alter the recording file name after the call has been finished and will replace the post variable with the value from the default fields. The default is FULLDATE\_AGENT and would look like this 20051020-103108\_6666. Another example is CAMPAIGN\_TINYDATE\_CUSTPHONE which would look like this TESTCAMP\_51020103108\_3125551212. The resulting filename must be less than 90 characters in length. Default is NONE.

**Routing Initiated Recording** - This option, if enabled, allows you to have the call routing script for Inbound calls trigger the agent call recording instead of the agent screen. This option will only work if the recording option is set to ALLCALLS or ALLFORCE. This will not work with inbound on-hook agents. Default is N for disabled.

**Stats Percent of Calls Answered Within X seconds** - This field allows you to set the number of hold seconds that the realtime stats display will use to calculate the percentage of answered calls that were answered within X number of seconds on hold.

**Stats Percent of Calls Answered Within X seconds 2** – This allows you to set a second threshold for hold seconds on the real-time display.

**Enter In-Group URL** - This web URL address is called every time a call enters the queue, right before the system looks for an agent to send the call to. If the call leaves the In-Group before that time, such as for No-Agent No-Queue, Max Calls, After Hours, etc..., this URL will not be called. Default is

blank.

**Start Call URL** - If it is populated, this web URL address is not seen by the agent, but it is called every time a call is sent to an agent. Uses the same variables as the web form fields and scripts. Default is blank.

**Dispo Call URL** - This web URL address is not seen by the agent, but it is called every time a call is dispositioned by an agent if it is populated. Uses the same variables as the web form fields and scripts. `dispo`, `talk_time` and `term_reason` are the variables you can use to retrieve the agent-defined disposition for the call and the actual talk time in seconds of the call as well as how the call was ended. Default is blank. If you put ALT into this field and submit this form, you will be able to go to a separate page where you can define multiple URLs for this action as well as specific statuses that will trigger them. If you want the campaign Dispo Call URL to be used for inbound calls, then put CAMP into this field.

NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. Or DROP calls could be sent to a list on list in another campaign, so that those customers can be given more care. The script can also be found in the Non-agent API document:

```
VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1
```

You can even send different statuses to various other lists (exp. "STATUS 1" to LIST A, while sending "STATUS 2" to LIST B). You will just need to affix `_1` to the end of each specific variable comment (The next would be `_2` then `_3` and so on). The Script example below shows exactly how this would work. You can send leads to up to 99 different lists.

If you set the Dispo Call URL field to "ALT" and submit, then a new link to the Alternate Dispo Call URL amin page will appear. This page will allow you to set multiple Dispo Call URLs that can all be executed after a call is dispositioned by an agent. This page also has more options on when to execute these Alternate Dispo Call URLs by a list of statuses and/or lists.

**Alternate Multi URLs** - This page allows you to define Alternate URLs with conditions in place of the simple URL option for Dispo, Start, Add Lead or No Agent URLs. The RANK field will define the order in which the URLs are requested, this is important because if you have a URL that may take a few seconds to run ranked as 1, that will mean that any URLs ranked after it will have to wait to be run until that first URL request receives a response. The ACTIVE field will determine whether the specific URL is run. The STATUSES field only works for the Dispo URLs and will determine which disposition statuses will trigger the URL being run, if you want to run the entry for all statuses just fill in ---ALL--- in this field, if you want only a few statuses, separate them by spaces. If populated, the LISTS field will limit the calls that the URL is run from to only the list IDs listed in this field. To have it run for all lists, leave the field blank, if you want only a few lists, separate them by spaces. The URL field works the same as it would in the URL option in campaigns, in-groups and lists, and it is also limited to 2000 characters in length. If you want to delete a URL, it must first be set to not active, then you can click on the DELETE link below the SUBMIT button for that URL entry.

**No Agent Call URL** - This web URL address is not seen by the agent, but if it is populated it is called every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. --A--dispo--B-- can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank. If you put ALT into this field and submit this form, you will be able to go to a separate page where you can define multiple URLs for this action as well as specific statuses that will trigger them.

**Waiting Call URL On/Off** - This feature allows you to trigger a URL when there are calls waiting in this In-Group. The -On- URL will be sent the first time a call is waiting, and no more will be sent as long as there are still calls from this In-Group waiting in the queue. The -Off- URL will be sent as soon as there are no calls waiting for this In-Group anymore. This feature was created to allow for a remote power switch to be triggered to light up a flashing light to notify agents in a call center room that there were calls waiting for them. For this feature to work, both the -On- and -Off- URLs must be filled in. Default is -empty- for disabled.

**Add Lead URL** - This web URL address is not seen by the agent, but it is called every time a lead is added to the system through the inbound process. Default is blank. You must begin this URL with VAR if you want to use variables, and of course --A-- and --B-- around the actual variable in the URL where you want to use it. Here is the list of variables that are available for this function. lead\_id, vendor\_lead\_code, list\_id, phone\_number, phone\_code, did\_id, did\_extension, did\_pattern, did\_description, uniqueid

**Add Lead Timezone** - This is the method that the system will use to determine the current timezone when a lead is created when a call is being routed through this in-group. SERVER will use the current timezone of the server. PHONE\_CODE\_AREACODE will look up the timezone based on the phone code set in the lead and the areacode of the phone number. Default is SERVER.

**Extension Append CID** - If enabled, the calls coming in from this in-group will have a space and the phone extension of the agent appended to the end of the CallerID name for the call before it is sent to the agent. Default is N for disabled. If USER is part of the option, then the user ID will be used instead of the phone extension. If WITH\_CAMPAIGN is used, then another spae and the campaign ID will be included as well.

**Uniqueid Status Display** - If enabled, when an agent receives a call through this in-group they will see the uniqueid of the call added to the status line in their agent interface. The PREFIX option will add the prefix defined blow to the beginning of the Uniqueid in the display. Default is DISABLED. If there was already a Uniqueid defined on a call entering this in-group, then the original Uniqueid will be displayed. If the PRESERVE option is used and the call is sent to a second agent, the Uniqueid and prefix displayed to the first agent will also be displayed to the second agent.

**Uniqueid Status Prefix** - If PREFIX option is selected above then this is the value of that prefix. Default is empty.

**Populate Lead In-Group** -If this option is ENABLED, then when a new lead is created when going into an In-Group, the security\_phrase or Show field will be populated with the Group ID of the In-Group. Default is ENABLED.

**Populate Lead Province** - If this option is not DISABLED, then the system will look up the original DID that the inbound call came in on and populate one of the listed DID fields in the province field on the customer lead. The OW options will overwrite the province field every time the call enters this In-Group. Default is DISABLED.

**Populate Lead Owner** - If this option is not DISABLED, then the system will look up the original DID that the inbound call came in on and populate one of the listed DID fields in the owner field on the customer lead. The OW options will overwrite the owner field every time the call enters this In-Group. If the OWNERCUSTOM option is used, then the owner field will only be populated with the value used to search for the lead with, if that Handle Method was used. Default is DISABLED.

**Populate Lead State Areacode** - If this option is not DISABLED, then the system will look up the state that the areacode of the phone number is from and populate the state field with that value. If the OVERWRITE\_ALWAYS option is selected, then every time that lead goes through this in-group, the state field will be looked up and populated again. Default is DISABLED.

**Populate Lead Source** - If this option is not DISABLED and there is no source\_id channel variable set on the call, then the system will fill the source\_id lead field with one of the other options when leads are added with an inbound call. INBOUND\_NUMBER will use the inbound phone number dialed. BLANK will leave the source\_id field blank. DISABLED will use the default behavior which will set the source\_id field to VDCL. Default is DISABLED.

**Populate Lead Vendor** - If this option is not DISABLED, and the inbound call was not delivered with a VID option, then the system will put the value entered in this setting into the vendor\_lead\_code field when a new lead is inserted. Special options include INBOUND\_NUMBER which will use the inbound phone number dialed. Default is INBOUND\_NUMBER.

**Populate Lead Comments** - If this option is not DISABLED, then the system will put the value entered in this setting into the comments field when a new lead is inserted. Special options include CALLERID\_NAME which will use the CallerID Name as supplied in the incoming phone call. Default is CALLERID\_NAME.

**After Call Survey** - If this option is ENABLED, then the customer calling in to this In-Group will be asked if they would like to participate in a survey after their call has been handled by an agent. Default is DISABLED.

**After Call Survey Accept Filename** - If the After Call Survey option is enabled above, this is the filename of the audio prompt that is played to ask the customer if they want to participate in the survey.

**After Call Survey Accept Digit** - If the After Call Survey option is enabled above, this is the digit that the customer must press to have their call set to take a survey after the agent has handled their call.

**After Call Question Filename** - If the After Call Survey option is enabled above, and if the customer has chosen to take the survey, this is the audio prompt filename that will play the question to the customer. The response to this survey question will be stored in the live\_inbound\_log database table.

**After Call End Call Menu** - If the After Call Survey option is enabled above, this is the Call Menu that the customer will be sent to after the customer has responded to the survey question. This option

can allow the customer to answer additional questions within Call Menus if desired. If this field is blank, the customer phone call will be hung up after they respond to the question.

**QC Enabled** - Setting this field to Y allows for the agent Quality Control features to work. Default is N.

**QC Statuses** - This area allows the selection of which statuses of leads should be gone over by the QC system. Place a check next to the status that you want QC to review.

**QC Statuses ID** - This area is where you select which "QC\_TEMPLATE" settings container will be used to determine the call statuses that are eligible for QC evaluation in this ingroup. This will override both campaign and list "QC Statuses ID" settings.

**QC WebForm** - The website address that a QC agent can go to when clicking on the WEBFORM link in the QC screen.

**QC Scorecard** - This is the scorecard to be shown to the agent when evaluating a QC record.

**QC Script** - The script that can be used by QC agents in the SCRIPT tab in the QC screen.

**QC Shift** - The shift timeframe used to pull QC records for an inbound\_group. The days of the week are ignored for these functions.

**QC Get Record Launch** - Allows one of the following actions to be triggered upon a QC agent receiving a new record.

**QC Show Recording** - This allows for a recording that may be linked with the QC record to be display in the QC agent screen.

## **Inbound Group Agent Rank, Grade, and Call Count**

At the bottom of the in-group modification screen there is a section that shows the ranks and grades of all agents for the in-group as well as the number of calls that each agent has taken in from that in-group for the day. This is also a form that allows you to modify the grade and rank for each agent, as well as if this In-Group is selected automatically for that agent.

## **Inbound Group Report**

Select the link "Click here to see a report for this inbound group" to view the Inbound Report. This report is identical to the Inbound report available on the reports page.

## **Logged in Agents Report**

Select the link "Click here to see agents logged in to this inbound group" to view a quick report of just that. This is the fastest method to view all the agents currently logged into an ingroup.

## DIDs Using In-Group

Shows a list of all DIDs that may direct calls to this particular ingroup.

## Call Menus Using This In-Group

Shows a list of all Call Menus that may direct calls to this particular ingroup.

## Campaigns Using This In-Group

Shows a list of all Campaigns that have this as an “allowed ingroup”.

## Delete In-Group

If the option is enabled, a manager can go to the bottom of the in-group modification page and click on the "DELETE THIS IN-GROUP" link to remove an in-group from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS IN-GROUP" link to remove the in-group from the system.

Figure 15. Email Groups List



The screenshot shows the 'ADMINISTRATION' page with a sidebar menu on the left and a table of 'EMAIL GROUP LISTINGS' on the right. The sidebar menu includes: Reports, Users, Campaigns, Lists, Quality Control, Scripts, Filters, and Inbound. The 'Inbound' section is expanded, showing options: Show In-Groups, Add A New In-Group, Copy In-Group, Show Email Groups, Add New Email Group, and Copy Email Group. The table has the following columns: IN-GROUP, NAME, PRIORITY, ACTIVE, UNREAD EMAILS, ADMIN GROUP, TIME, COLOR, and MODIFY.

IN-GROUP	NAME	PRIORITY	ACTIVE	UNREAD EMAILS	ADMIN GROUP	TIME	COLOR	MODIFY
dbNewEmail	DanEmail	0	Y NA	0	etest		RED	MODIFY
DEV_EMAIL	Dev test email	0	Y	6	---ALL---		PINK	MODIFY
EMAIL_XFER_TEST	Testing email transfers	-1	Y NA	0	---ALL---		YELLOW	MODIFY
EMAILCOPY	Test ingroup for priority	1	Y NA	2	---ALL---		GREEN	MODIFY
INT_TEST	1111	10	Y NA	0	---ALL---		GREY	MODIFY
JON_TEST_IN_EMAIL	Jons test email ingroup	0	Y NA	1	---ALL---	24hours	BROWN	MODIFY
MIKE_EMAIL	MAIL BACKED UP	-99	N	0	---ALL---		PINK	MODIFY
MIKE_EMAIL_NEW	Mikes Email Testing	-99	Y	0	---ALL---		GREEN	MODIFY
NEWEMAIL	TEST inbound galleria	0	Y NA	0	---ALL---	24hours	RED	MODIFY
TEST_EMAIL_EMPTY	test empty email in-group	-55	Y NA	0	---ALL---		WHITE	MODIFY

## Dialer INBOUND Email

Email Groups allow agents to handle inbound emails, just as they would inbound calls. The incoming email automatically pulls up the customer's lead information on the agent's screen, while simultaneously locking it to keep them from receiving further calls or emails. Once they have responded to the email they will disposition the lead, like any other call, and they are immediately available for more calls or emails.

NOTE: This feature must be enabled in Admin/System Settings and an “E” keep alive needs to be

added to ONLY ONE of the servers. The following modules need to have been installed:  
LWP::UserAgent, HTML::Entities, HTML::Strip, HTML::FormatText, HTML::TreeBuilder, Switch,  
Time::Local, MIME::Decoder, Mail::POP3Client, Mail::IMAPClient, Mail::Message, IO::Socket::SSL,  
MIME::Base64, MIME::QuotedPrint, ### inbound email parser (this must be added to the crontab of  
ONLY ONE server), \* \* \* \* \* /usr/share/astguiclient/AST\_inbound\_email\_parser.pl

## Add a New Email Group

You can get to the Add a New Email Group screen by clicking on the "Add New Email Group" link in the Inbound section. When adding a new email group, make sure the Email Group ID and Email Group Name are between 2-20 characters (no spaces). Once you create an Email ID you will not be able to change it, unless you delete that Email Group and re-create it again. You cannot have duplicate Email IDs in the system. The Group ID, Group Name, and Group Color fields are required before clicking "Submit" to add the group, the remaining fields are optional.

## Modify Email Group

*(screen shot of Modify Email Group screen available in the Appendix)*

**Group ID** - the short name of the inbound group. After initial submission it can not be edited. This must be between 2 and 20 characters in length, and cannot be the same as any other In-Group or Campaign ID.

**Group Name** - The full name of the email account, it must be between 2 and 30 characters in length.

**Group Color** - The color that displays in the agent client app when an email comes in on this group. It must be between 2 and 7 characters long. If this is a hex color definition, a # must be placed at the beginning of the string or the agent screen will not work properly.

**Active** - This field indicates where you set if this is an active Email Group or not. Default is Y.

**In-Group Email Date** - The last date and time an email was directed to this inbound group

**Web Form/Web Form Two/Three** - The custom addresses that will launch when the corresponding button is clicked on the agent's screen. To use custom fields in a web form address, add *&CF\_uses\_custom\_fields=Y as part of your URL.*

**Next Agent Email** - Determines which available agent receives the next email:

- random: orders by the random update value in the live\_agents table
- oldest\_call\_start: orders by the last time an agent was sent an email. Results in agents receiving about the same number of emails overall.
- oldest\_call\_finish: orders by the last time an agent finished an email. AKA agent waiting longest receives first email.
- oldest\_inbound\_call\_start: orders by the last time an agent was sent an email. Results in agents receiving about the same number of emails overall.
- oldest\_inbound\_call\_finish: orders by the last time an agent finished an email. AKA agent waiting longest receives first email.
- overall\_user\_level: orders by the user\_level of the agent as defined in the users table a higher user\_level will receive more emails.



- `inbound_group_rank`: orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
- `campaign_rank`: orders by the rank given to the agent for the campaign. Highest to Lowest.
- `ingroup_grade_random`: gives a higher probability of getting an email to the higher graded agents by in-group.
- `campaign_grade_random`: gives a higher probability of getting an email to the higher graded agents by campaign.
- `fewest_calls`: orders by the number of emails received by an agent for that specific inbound group. Least emails first.
- `fewest_calls_campaign`: orders by the number of emails received by an agent for the campaign. Least emails first.
- `longest_wait_time`: orders by the amount of time agent has been actively waiting for an email.

NOTES: For `ring_all`, the agents that are using phones that have On Hook Agent enabled will have their phones ring and the first one to answer will receive the call and the information on the agent screen. Since `ring_all` ignores agent wait time and ranking and will call every agent that is available for the queue, we do not recommend using this method for large queues. When using `ring_all`, agents logged with phones that have the On Hook Agent disabled will have to use the Calls In Queue panel and click on the TAKE CALL link to take calls in queue. The amount of time the agents phone will ring for `ring_all` is set to the On-Hook Ring Time setting or the shortest ring time of the phones that will be called. We do not recommend using `ring_all` on high call volume queues, or queues with many agents. The `ring_all` method is intended to be used with only a few agents and on low call volume in-groups.

**Queue Priority** - Used to define the order in which the emails from this inbound group should be answered in relation to calls or emails from other inbound groups. If the priority of this email group is set even 1 digit higher than the campaign, ingroups, or other email groups the agent is logged into; this group will always take precedence.

**Frontier Display** – This feature not currently functional. Please see future manual versions for updates.

**Status Group Override** -If this field is set, this Status Group will be used instead of the campaign statuses for calls handled by agents from this inbound group. This does not affect System Statuses which will always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Start Email URL** – If populated, this web URL address string is sent each time an email is received by an agent. This message is never seen by the agent. It uses the same variables as the web form fields and scripts. Default is blank.

**Dispo Email URL** - If populated, this web URL address string is sent each time an email is statused by an agent. This message is never seen by the agent. It uses the same variables as the web form fields and scripts. The variables *dispo* and *talk\_time* can be used to retrieve the agent-defined disposition and the actual time spent working, in seconds, on the email. Default is blank.

NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. The script can also be found in the Non-agent API document:

```
VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1
```

You can even send different statuses to various other lists (exp. "STATUS 1" to LIST A, while sending "STATUS 2" to LIST B). You will just need to affix `_1` to the end of each specific variable comment (The next would be `_2` then `_3` and so on). The Script example below shows exactly how this would work. You can send leads to up to 99 different lists.

**No Agent Email URL** - This feature not currently functional. Please see future manual versions for updates.

**QC Enabled** - Setting this to Y allows for the agent Quality Control features to work. Default is N.

**QC Statuses** - Selects which lead statuses should be gone over by the QC system. Check the box next to the status you want QC to review.

**QC WebForm** - The website address that a QC agent will access when clicking on the WEBFORM link in the QC screen.

**QC Script** - The script that can be used by QC agents in the SCRIPT tab in the QC screen.

**QC Shift** - The shift timeframe used to pull QC records for an inbound group. The days of the week are ignored for these functions.

**QC Get Record Launch** - Allows one of the following actions to be triggered upon a QC agent receiving a new record.

**QC Show Recording** - Allows for a recording that may be linked to the QC record and displayed in the QC agent screen.

## Email Group Rank, Grade, and Email Count

At the bottom of the Email modification screen there is a section that shows the ranks and grades of all agents for the Email Group as well as the number of emails each agent has taken from that Email Group for the day.

## Inbound Group Report

Select the link "Click here to see a report for this inbound group" to view the Inbound Report. This report is identical to the Inbound report available on the reports page.

## Logged in Agents Report

Select the link "Click here to see agents logged in to this inbound group" to view a quick report of just that. This is the fastest method to view all the agents currently logged into an email/ingroup.

## **Email Accounts using this In-group**

Shows a list of all Email Accounts (in Admin - Email Accounts) that may direct emails to this particular Email Group.

## **Campaigns allowing this In-group**

Shows a list of all campaigns that will allow agents to login to this particular Email Group.

## **Delete Email In-group**

If the option is enabled, a manager can go to the bottom of the in-group modification page and click on the "DELETE THIS IN-GROUP" link to remove the Email Group from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS IN-GROUP" link to remove the in-group from the system.

## **Copy Email Group**

This page will allow you to copy all of an existing Email Group's settings into a new in-group. You just need to enter a new Email Group ID, Email Group name and a source Email Group that it will copy the other settings from.

IN-GROUP	NAME	PRIORITY	ACTIVE	ADMIN GROUP	TIME	COLOR	MODIFY
AGENTDIRECT_CHAT	Agent Direct Queue for Chats	99	Y	---ALL---	24hours	Yellow	MODIFY
AGENTDIRECTchat	Testing	0	Y	---ALL---		Black	MODIFY
asdfsdfadfd	asdfsdfadfd	0	Y NA	---ALL---	24hours	Pink	MODIFY
CHAT_TEST_GROUP	initial chat test group	0	Y	---ALL---		Yellow	MODIFY
MIKECHAT	Mikes Chatroom	0	Y	---ALL---		Yellow	MODIFY

Figure 16. Chat Groups List

## Dialer INBOUND CHAT

Chat Groups allow agents to handle inbound website customer chat sessions, just as they would inbound calls. The incoming chats automatically pulls up the customer's lead information on the agent's screen, while simultaneously locking it to keep them from receiving further calls or chats. Once they have finished the chat session with the customer, they will disposition the lead, like any other call, and they are immediately available for more calls or chats.

NOTE: This feature must be enabled in Admin → System Settings.

## Add a New Chat Group

You can get to the Add a New Chat Group screen by clicking on the "Add New Chat Group" link in the Inbound section on the Left menu bar. When adding a new chat group, make sure the Chat Group ID and Chat Group Name are between 2-20 characters (no spaces). Once you create an Chat ID you will not be able to change it, unless you delete that Chat Group and re-create it again. You cannot have duplicate Chat IDs in the system, and these IDs cannot be the same as any other In-Group or Campaign. The Group ID, Group Name, and Group Color fields are required before clicking "Submit" to the add the group, the remaining fields are optional.

## Modify Chat Group

(screen shot of Modify Chat Group screen available in the Appendix)

**Group ID** - the short name of the inbound group. After initial submission it can not be edited. This must be between 2 and 20 characters in length.

**Group Name** - The full name of the chat account, it must be between 2 and 30 characters in length.

**Group Color** - The color that displays in the agent client app when an chat comes in on this group. It must be between 2 and 7 characters long. If this is a hex color definition, a # must be placed at the beginning of the string or the agent screen will not work properly.

**Active** - This field indicates where you set if this is an active chat Group or not. Default is Y.

**In-Group Chat Date** - The last date and time an chat was directed to this inbound group

**Default List ID** – The list ID that a new chat customer is put into if not found in the system.

**Web Form/Web Form Two/Three** - The custom addresses that will launch when the corresponding button is clicked on the agent's screen. To use custom fields in a web form address, add *&CF\_uses\_custom\_fields=Y as part of your URL.*

**Next Agent Chat** - (this feature is currently non-functional)

**Queue Priority** - Used to define the order in which the chats from this inbound group should be answered in relation to calls or chats from other inbound groups. If the priority of this chat group is set even 1 digit higher than the campaign, ingroups, or other chat groups the agent is logged into; this group will always take precedence.

**Frontier Display** – This feature not currently functional. Please see future manual versions for updates.

**Status Group Override** -If this field is set, this Status Group will be used instead of the campaign statuses for calls handled by agents from this inbound group. This does not affect System Statuses which will always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Start Chat URL** – If populated, this web URL address string is sent each time an chat is received by an agent. This message is never seen by the agent. It uses the same variables as the web form fields and scripts. Default is blank.

**Dispo Chat URL** - If populated, this web URL address string is sent each time an chat is statused by an agent. This message is never seen by the agent. It uses the same variables as the web form fields and scripts. The variables *dispo* and *talk\_time* can be used to retrieve the agent-defined disposition and the actual time spent working, in seconds, on the chat. Default is blank.

NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. The script can also be found in the Non-agent API document:

```
VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1
```

You can even send different statuses to various other lists (exp. "STATUS 1" to LIST A, while sending "STATUS 2" to LIST B). You will just need to affix *\_1* to the end of each specific variable comment

(The next would be \_2 then \_3 and so on). The Script example below shows exactly how this would work. You can send leads to up to 99 different lists.

**No Agent Chat URL** - This feature not currently functional. Please see future manual versions for updates.

**Customer Chat Screen Colors** -This option allows you to select the colors and logo that the customer will see when they use the chat screen. default is the default blue color scheme. (see Figure 16 below for an example)

**Customer Chat Survey Link** -This option allows you to define a link that the customer can go to after their chat session is over so that they can take a survey. If no link is defined then the customer will not be presented with a link. default is the empty.

**Customer Chat Survey Text** -If the Survey Link above is populated, then this field can be used to define the text that is shown to the customer for them to click on to go to the survey link. default is the empty, in which case -PLEASE TAKE OUR SURVEY- will be used.

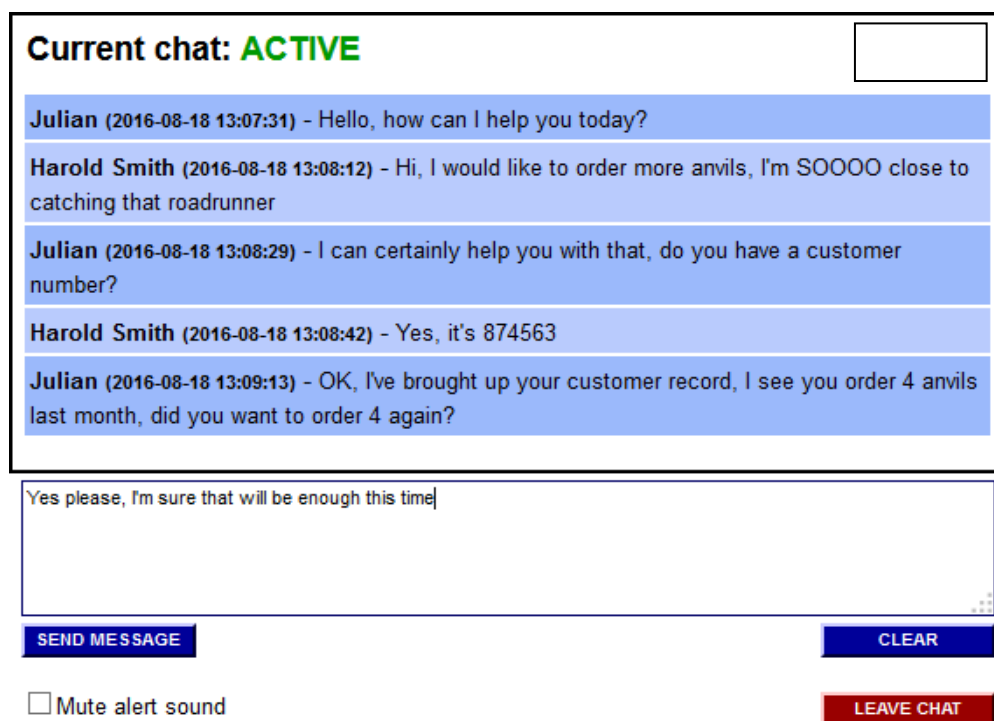


Figure 17. Website Customer Chat Screen

**QC Enabled** - Setting this to Y allows for the agent Quality Control features to work. Default is N.

**QC Statuses** - Selects which lead statuses should be gone over by the QC system. Check the box next to the status you want QC to review.

**QC WebForm** - The website address that a QC agent will access when clicking on the WEBFORM link in the QC screen.

**QC Script** - The script that can be used by QC agents in the SCRIPT tab in the QC screen.

**QC Shift** - The shift timeframe used to pull QC records for an inbound group. The days of the week are ignored for these functions.

**QC Get Record Launch** - Allows one of the following actions to be triggered upon a QC agent receiving a new record.

**QC Show Recording** - Allows for a recording that may be linked to the QC record and displayed in the QC agent screen.

## **Chat Group Rank, Grade, and Chat Count**

At the bottom of the Chat Group modification screen there is a section that shows the ranks and grades of all agents for the Chat Group as well as the number of chats each agent has taken from that Chat Group for the day.

## **Inbound Group Report**

Select the link “Click here to see a report for this inbound group” to view the Inbound Report. This report is identical to the Inbound report available on the reports page.

## **Logged in Agents Report**

Select the link “Click here to see agents logged in to this inbound group” to view a quick report of just that. This is the fastest method to view all the agents currently logged into an chat/ingroup.

## **Campaigns allowing this In-group**

Shows a list of all campaigns that will allow agents to login to this particular Chat Group.

## **Delete Chat In-group**

If the option is enabled, a manager can go to the bottom of the in-group modification page and click on the "DELETE THIS IN-GROUP" link to remove the Chat Group from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS IN-GROUP" link to remove the in-group from the system.

## **Copy Chat Group**

This page will allow you to copy all of an existing Chat Group's settings into a new in-group. You just need to enter a new Chat Group ID, Chat Group name and a source Chat Group that it will copy the other settings from.



#	DID	DESCRIPTION	CARRIER	ACTIVE	ADMIN	GROUP	ROUTE	REC	MODIFY
17	vidlookup	dummy vidprompt lookup		Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
72	UID:1234	test colon did		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
13	empty	test empty		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
5	default	Default DID		Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
74	9995554444	Cross-server lead test		Y	---	ALL	CALLMENU	N	<a href="#">MODIFY</a>
54	99900005	internal state route TX	TX	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
53	99900004	internal state route CA	CA	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
52	99900003	internal state route NY	NY	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
51	99900002	internal state route IL	IL	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
50	99900001	internal state route FL	FL	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
56	99800002	inbound test areacode entry		Y	---	ALL	CALLMENU	N	<a href="#">MODIFY</a>
55	99800001	inbound test postal entry		Y	---	ALL	CALLMENU	N	<a href="#">MODIFY</a>
39	900	900		Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
8	8889	tst1_inbound DID		Y	---	ALL	PHONE	N	<a href="#">MODIFY</a>
23	8887776666	fake did	carrier description here test6	Y	---	ALL	IN_GROUP	N	<a href="#">MODIFY</a>
2	8882012040	8882012040 Commercial 1		Y	---	ALL	CALLMENU	N	<a href="#">MODIFY</a>
36	8675309	Int Testing		Y	---	ALL	AGENT	Y_QUEUESTOP	<a href="#">MODIFY</a>
37	8675308	Int Test copy		Y	---	ALL	AGENT	Y_QUEUESTOP	<a href="#">MODIFY</a>
62	8168	forward to recording exten		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
112	8135551139	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
111	8135551138	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
110	8135551137	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
109	8135551136	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
108	8135551135	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
107	8135551134	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
106	8135551133	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
105	8135551132	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
104	8135551131	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
103	8135551130	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
102	8135551129	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
101	8135551128	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
100	8135551127	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
99	8135551126	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
98	8135551125	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
97	8135551124	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
96	8135551123	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
95	8135551122	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
94	8135551121	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
93	8135551120	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>
92	8135551119	Test Tampa DID		Y	---	ALL	EXTEN	N	<a href="#">MODIFY</a>

Figure 18. DIDs

## Dialer INBOUND DIDS

Also in the Inbound section are the DID functions which give you control over adding, modifying and deleting inbound DIDs(DID means Direct Inward Dialing, also known as DDI, Direct Dial-In, which are phone numbers that you have set up with an inbound telephone carrier to be directed to your system).

### Add a New DID

You can get to the Add DID screen by clicking on the "ADD A NEW DID" link at the top of the IN-GROUPS section. When adding a new DID you must make sure that you set the DID extension and DID name or the submission will not be accepted. Also, please ensure that the DID extension you have chosen does not have any spaces or punctuation characters. Once you create a DID, you will not be able to change the DID extension unless you delete the DID and re-create it again with a different DID extension. You cannot have duplicate DIDs in the system, and DID extensions must be between 2 and 20 characters in length.

DIDs can be directed to:

- Extensions in any context in the dialplan (including Asterisk-based IVRs)
- A specific agent's user session
- Phones that are specified in the Dialer interface
- Dialer In-Groups
- Dialer Call Menus
- Voicemail

- Custom extensions per call, looked up using the Filter URL features

## Copy A DID

This page will allow you to copy all of an existing DID's settings into a new DID. You just need to enter a new DID extension, DID name and a source DID to take the other settings from.

## Modify DID

*(screen shot of Modify DID screen available in the Appendix)*

**DID Extension** - This is the number, extension or DID that will trigger this entry and that you will route within the system using this function. There is a reserved “default” DID that you can use which is just the word -default- without the dashes, that will allow you to send any call that does not match any other existing DID Extension patterns to the default DID.

**DID Description** - This is the description of the DID routing entry.

**DID Carrier Description** - This is another description field for the DID, to be used to describe the carrier of this DID. It is not used for any other purpose in the system.

**Active** - This is the field where you set the DID entry to active or not. Default is Y.

**Admin User Group** - This is the administrative user group for this DID, it allows admin viewing of this DID to be restricted by user group. Default is --ALL-- which allows any admin user with user group DID permissions to view this DID entry.

**DID Route** - This is the type of route that you set the DID to use. EXTEN will send calls to the extension entered below, VOICEMAIL will send calls directly to the voicemail box entered below, AGENT will send calls to a Dialer agent if they are logged in, PHONE will send the call to a phone entry selected below, IN\_GROUP will send calls directly to the specified inbound group. Default is EXTEN. CALLMENU will send the call to the defined Call Menu.

**Record Call** - This option allows you to set the calls coming into this DID to be recorded. Y will record the entire call, Y\_QUEUESTOP will record the call until the call is hung up or enters an in-group queue, N will not record the call. Default is N.

NOTE: Your Administrator must enable the “Mix Crontab Entry”

**Extension** - If EXTEN is selected as the DID Route, then this is the dialplan extension that calls will be sent to. Default is 9998811112, no-service.

**Route Answer** - If enabled, the phone call will receive an Answer signal when it is routed to an In-Group or Agent. Default is Y.

**Extension Context** - If EXTEN is selected as the DID Route, then this is the dialplan context that calls will be sent to. If you want to send calls to VOICEMAIL or VMAIL\_NO\_INST, then you need to set this option to default for it to work properly. Default is default.

**Voicemail Box** - If VOICEMAIL is selected as the DID Route, then this is the voicemail box that calls

will be sent to. Default is empty.

**Phone Extension** - If PHONE is selected as the DID Route, then this is the phone extension that calls will be sent to.

**Phone Server IP** - If PHONE is selected as the DID Route, then this is the server IP for the phone extension that calls will be sent to.

**Call Menu** - If CALLMENU is selected as the DID Route, then this is the Call Menu that calls will be sent to.

**User Agent** - If AGENT is selected as the DID Route, then this is the Dialer Agent that calls will be sent to if they are logged into the agent screen. The agent must be logged in and must have selected an AGENTDIRECT in-group to be able to take these calls.

**User Unavailable Action** - If AGENT is selected as the DID Route, and the user is not logged in or available, then this is the route that the calls will take.

**User Route Settings In-Group** - If AGENT is selected as the DID Route, then this is the In-Group that will be used for the queue settings as the caller is waiting to be sent to the agent. Default is AGENTDIRECT.

**In-Group ID** - If IN\_GROUP is selected as the DID Route, then this is the In-Group that calls will be sent to.

**In-Group Call Handle Method** - If IN\_GROUP is selected as the DID Route, then this is the call handling method used for these calls. CID will add a new lead record with every call using the Caller ID as the phone number, CIDLOOKUP will attempt to lookup the phone number by the Caller ID in the entire system, CIDLOOKUPRL will attempt to lookup the phone number by the Caller ID in only one specified list, CIDLOOKUPRC will attempt to lookup the phone number by the Caller ID in all of the lists that belong to the specified campaign, CLOSER is specified for Dialer Closer calls, ANI will add a new lead record with every call using the ANI as the phone number, ANILOOKUP will attempt to lookup the phone number by the ANI in the entire system, ANILOOKUPRL will attempt to lookup the phone number by the ANI in only one specified list, XDIGITID will prompt the caller for an X digit code before the call will be put into the queue, VIDPROMPT will prompt the caller for their ID number and will create a new lead record with the Caller ID as the phone number and the ID as the Vendor ID, VIDPROMPTLOOKUP will attempt to lookup the ID in the entire system, VIDPROMPTLOOKUPRL will attempt to lookup the vendor ID by the ID in only one specified list, VIDPROMPTLOOKUPRC will attempt to lookup the vendor ID by the ID in all of the lists that belong to the specified campaign. If a CIDLOOKUP method is used with ALT, it will search the alt\_phone field for the phone number if no matches are found for the main phone number. If a CIDLOOKUP method is used with ADDR3, it will search the address3 field for the phone number if no matches are found for the main phone number and optionally the alt\_phone field. Default is CID. If OWNERCUSTOM is used, the lead that is looked up will have to have an -owner- field value that matches the DID CUSTOM 1,2,3,4 or 5 value that is set when the lead is searched, in addition to the phone number (If used in a Call Menu, the -VID Enter- field will be used to match the -owner- lead field).

**In-Group Agent Search Method** - If IN\_GROUP is selected as the DID Route, then this is the agent search method to be used by the inbound group, LO is Load-Balanced-Overflow and will try to send the call to an agent on the local server before trying to send it to an agent on another server, LB is Load-Balanced and will try to send the call to the next agent no matter what server they are on, SO is Server-Only and will only try to send the calls to agents on the server that the call came in on. Default is LB.

**In-Group List ID** - If IN\_GROUP is selected as the DID Route, then this is the List ID that leads may be searched through and that leads will be inserted into if necessary.

**In-Group Entry List ID** - If IN\_GROUP is selected as the DID Route, then this is the Entry List ID that a new lead will be populated with if a new lead is added. Default is 0 for disabled. (This feature has to be enabled in Admin → System Settings).

**In-Group Campaign ID** - If IN\_GROUP is selected as the DID Route, then this is the Campaign ID that leads may be searched for in if the call handle method is CIDLOOKUPRC.

**In-Group Phone Code** - If IN\_GROUP is selected as the DID Route, then this is the Phone Code used if a new lead is created.

**Clean CID Number** - This field allows you to specify a number of digits to restrict the incoming caller ID number to by putting an R in front of the number of digits, for example to restrict to the right 10 digits you would enter in R10. You can also use this feature to remove only a leading digit or digits by putting an L in front of the specific digits that you want to remove, for example to remove a 1 as the first digit you would enter in L1. The T option which will trim the end number to a specific number of digits from the left for example T3 on 12345 will return 123. Default is empty. If more than one rule is specified make sure you separate them with a space and they will be executed in the following order R L T.

**No-Agent In-Group Redirect** -This setting allows you to redirect calls on this DID if there are no logged-in agents set to take calls from a specific In-Group. If this field is set to Y or NO\_PAUSED and there are no agents logged in to take calls from the specific In-Group the calls will go to the No Agent In-Group Extension set below. The NO\_PAUSED option will only send the call to the defined Extension if there are only paused agents in the in-group. The READY\_ONLY option will send the call to the defined Extension if there are no agents waiting for calls right now in the in-group. Default is DISABLED. See the No Agent In-Group Extension setting below for more information.

**No-Agent In-Group ID** -For the No-Agent In-Group Redirect feature above to work properly, an in-Group must be selected from this menu. Default is blank.

**No-Agent In-Group Extension** -For the No-Agent In-Group Redirect feature above to work properly, an Extension must be set in this field. Default is 9998811112. Below you will see some examples of default extensions that you can use in the system to terminate calls to,

- 9998811112 - ANSWERED, This number is not in service
- 9993333333 - UNANSWERED, signal 1, unallocated number, immediate hangup
- 9998888888 - UNANSWERED, signal 17, busy signal, immediate hangup
- 9994444444 - UNANSWERED, signal 27, out of order, immediate hangup
- 9995555555 - UNANSWERED, ring for 120 seconds then hangup

**Max Queue In-Group Calls** -This setting allows you to redirect calls on this DID if the number of calls waiting in queue in a specific In-Group is above a set number. If this field is set to 0 this feature is disabled. Default is 0. See the Max Queue In-Group Extension setting below for more information.

**Max Queue In-Group ID** -For the Max Queue In-Group Calls feature above to work properly, an in-Group must be selected from this menu. Default is blank.

**Max Queue In-Group Extension** -For the Max Queue In-Group Calls feature above to work properly, an Extension must be set in this field. Default is 9998811112. Directly above, in the No-Agent In-Group Extension description, you will see some examples of default extensions that you can use in the system to terminate calls to.

**Pre-Filter Phone Group ID** -This option allows you to filter calls through a Filter Phone Group before going through the standard filtering process below. If a match is found then the call is redirected to the Pre-Filter Phone Group DID as defined below. Default is blank for disabled.

**Pre-Filter Phone Group DID** -For the Pre-Filter Phone Group ID feature above to work properly, a DID Pattern must be set in this field. Default is blank for disabled. It is recommended that you confirm the DID you enter here is properly set in the system before assigning it.

**Pre-Filter Recent Call** - The Pre-Filter Recent Call feature allows for the filtering of inbound phone calls by whether the phone number has previously been an outbound and-or inbound phone call in the system. This setting requires that a Settings Container of the type DID\_RECENT\_CALL be set up to specify the settings for how it will search for a previous call. In this settings container you can configure it for outbound calls or inbound calls or both. There are 4 settings for each outbound and inbound that you must use:

outbound\_recent\_call\_check\_type - can be set to lead-x-y-days-range or log-x-y-days-range, the difference being if the leads database is searched using the last\_local\_call\_time field or if the logs are searched using the call\_time field.

outbound\_recent\_call\_days - must be a range of days going back from today, with the start and end days separated by a dash. The start day will start at 00:00:00 and the end day would end at 23:59:59 local server time, so if 0-0 is set, it would search today for the full 24-hours of today.

outbound\_recent\_call\_campaigns - can be set to --ALL-- to have no campaign restrictions, or can be set to a pipe-delimited list of campaign IDs. For inbound, this setting is called inbound\_recent\_call\_groups and if the log method is used it should be a list of inbound group IDs if --ALL-- is not used.

outbound\_recent\_call\_statuses - can be set to --ALL-- to have no status restrictions, or can be set to a pipe-delimited list of statuses.

Here are examples of both outbound and inbound recent call filtering settings:

```
outbound_recent_call_check_type => lead-x-y-days-range
outbound_recent_call_days => 0-14
outbound_recent_call_campaigns => --ALL--
outbound_recent_call_statuses => --ALL--
```

```
inbound_recent_call_check_type => log-x-y-days-range
inbound_recent_call_days => 21-999
```

inbound\_recent\_call\_groups => TEST\_IN|TEST\_IN2|TEST\_IN3  
inbound\_recent\_call\_statuses => DNC|NI|LIT

WARNING: Using this feature may cause load problems and slow down your system.

**Pre-Filter Recent Call DID** - If the Pre-Filter Recent Call feature above is active and set to a valid Settings Container, then this field is the internal DID that the call would be sent to if there is a match for a recent call.

**Filter Inbound Number** - This option if enabled allows you to filter calls coming into this DID and send them to an alternative action if they match a phone number that is in the filter phone group or a URL response if you have configured one. Default is DISABLED. GROUP will search in a Filter Phone Group. URL will send a URL and will match if a 1 is sent back. DNC\_INTERNAL will search by the internal DNC list. DNC\_CAMPAIGN will search by one specific campaign DNC list. If the option has AREACODE at the end, then the number and an entry for that numbers 3 digit areacode will be searched for. Both DNC options already have areacode searching built in.

**Filter Phone Group ID** - If the Filter Inbound Number field is set to GROUP then this is the ID of the Filter Phone Group that will have its numbers searched looking for a match to the caller ID number of the incoming call.

**Filter URL** - If the Filter Inbound Number field is set to URL then this is the web address of a script that will search a remote system and return a 1 for a match and a 0 for no match. Only two variables are available in the address if you use the VAR prefix like with webform addresses in campaigns, --A--phone\_number--B-- and --A--did\_pattern--B-- can be used in the URL to indicate the caller ID of the caller and the DID that the customer called in on.

**Filter URL DID Redirect** -If the Filter Inbound Number field is set to URL then this setting allows the URL response to specify a system DID to redirect the call to instead of using the default action. If a 0 is returned then the default action is used. If anything other than a 0 is returned then the call will be redirected to the resulting URL response value.

**Filter DNC Campaign** -If the Filter Inbound Number field is set to DNC\_CAMPAIGN then this is the specific campaign ID that the campaign DNC list belongs to.

**Filter Action** - If Filter Inbound Number is activated and a match is found then this is the action that is to be taken. This is the same as the Route that you select for a DID, and the settings below function just like they do for a standard routing.

**Filter Extension** – If the Filter Action is set to EXTEN, this field indicates the extension where calls will be routed. Default is 9998811112

**Filter Extension Context** - If the Filter Action is set to EXTEN, then this represents the dialplan context that calls will be sent to (if & when this field is populated). Default is default.

**Filter Voicemail Box** - If the Filter Action is set to VOICEMAIL, this field indicates the voicemail box where calls will be deposited.

**Filter Phone Extension** - If the Filter Action is set to PHONE, this field indicates the Phone Extension where the calls will be sent.

**Filter Server IP** - If the Filter Action is set to PHONE, this field indicates the Server IP for the Phone Extension where the calls will be sent.

**Filter Call Menu** - If the Filter Action is set to CALLMENU, this field indicates the Call Menu where the calls will be routed.

**Filter User Agent** - If the Filter Action is set to AGENT, this field indicates the Used ID that will receive the calls.

**Filter User Unavailable Action** - If the Filter Action is set to AGENT, but the User is not logged in or available, calls will route to this location.

**Filter User Route Settings In-Group** - If the Filter Action is set to AGENT, then this is the In-Group that will be used for the queue settings as the caller is waiting to be sent to the agent. Default is AGENTDIRECT.

**Filter In-Group ID** - If the Filter Action is set to INGROUP, this field indicates the Ingroup where the calls will be routed.

**Filter In-Group Call Handle Method** - If the Filter Action is set to IN\_GROUP, then this is the call handling method used for these calls. CID will add a new lead record with every call using the Caller ID as the phone number, CIDLOOKUP will attempt to lookup the phone number by the Caller ID in the entire system, CIDLOOKUPRL will attempt to lookup the phone number by the Caller ID in only one specified list, CIDLOOKUPRC will attempt to lookup the phone number by the Caller ID in all of the lists that belong to the specified campaign, CLOSER is specified for DIALER Closer calls, ANI will add a new lead record with every call using the ANI as the phone number, ANILOOKUP will attempt to lookup the phone number by the ANI in the entire system, ANILOOKUPRL will attempt to lookup the phone number by the ANI in only one specified list, XDIGITID will prompt the caller for an X digit code before the call will be put into the queue, VIDPROMPT will prompt the caller for their ID number and will create a new lead record with the Caller ID as the phone number and the ID as the Vendor ID, VIDPROMPTLOOKUP will attempt to lookup the ID in the entire system, VIDPROMPTLOOKUPRL will attempt to lookup the vendor ID by the ID in only one specified list, VIDPROMPTLOOKUPRC will attempt to lookup the vendor ID by the ID in all of the lists that belong to the specified campaign. Default is CID. If a CIDLOOKUP method is used with ALT, it will search the alt\_phone field for the phone number if no matches are found for the main phone number. If a CIDLOOKUP method is used with ADDR3, it will search the address3 field for the phone number if no matches are found for the main phone number and optionally the alt\_phone field.

**Filter In-Group Agent Search Method** - If the Filter Action is set to IN\_GROUP, then this is the agent search method to be used by the inbound group, LO is Load-Balanced-Overflow and will try to send the call to an agent on the local server before trying to send it to an agent on another server, LB is Load-Balanced and will try to send the call to the next agent no matter what server they are on, SO is Server-Only and will only try to send the calls to agents on the server that the call came in on. Default is LB.

**Filter In-Group List ID** - If the Filter Action is set to IN\_GROUP, then this is the List ID that leads may be searched through and that leads will be inserted into if necessary.

**In-Group Entry List ID** - If IN\_GROUP is selected as the DID Route, then this is the Entry List ID that a new lead will be populated with if a new lead is added. Default is 0 for disabled.

**Filter In-Group Campaign ID** - If the Filter Action is set to IN\_GROUP, then this is the Campaign ID that leads may be searched for in if the call handle method is CIDLOOKUPRC.

**Filter In-Group Phone Code** - If the Filter Action is set to IN\_GROUP, then this is the Phone Code used if a new lead is created.

**Custom 1 through 5** - These five fields can be used for various purposes, mostly relating to custom programming and reports.

## Traffic Report

Queries calls by day (or days) and for either 1 or several DIDs, to display both a “DID Summary” & “Hold, Call, & Drop” statistics. The “DID Summary” shows any & all of the selected DIDs individually, their name, Inbound route, and the number of calls taken. The “Hold, Call, & Drop” shows call totals for the indicated DIDs, broken down in 15 minute intervals. This report also generates a bar graph at the bottom, showing all 3 call criteria, in the same intervals.

## List of Recordings and Calls

Queries a specific DID (for 1 or more days) and shows each inbound call handled. It displays the date, time, status, phone number, campaign, wait time, agents, list ID, lead ID, and hang up reason. If the DID, or campaign allows recordings, it will displays a link to those recordings; to either listen or download.

## Remote Agent Extension Overrides

This section allows you to enable DIDs to have extension overrides for remote agent routed calls through in-groups. The User Start must be a valid Remote Agent User Start or if you want the Extension Override entry to work for all calls then you can use ---ALL--- in the User Start field. If there are multiple entries for the same DID and User Start then the active entries will be used in a round robin method.

## Delete DID

If the option is enabled, a manager can go to the bottom of the DID modification page and click on the "DELETE THIS DID" link to remove a DID from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS DID" link to remove the DID from the system.



ADMINISTRATION		CALL MENU LISTINGS:				
	MENU ID	NAME	GROUP PROMPT	TIMEOUT	OPTIONS	MODIFY
Reports	277&\$?	test277&\$?	---ALL--	10	2	<a href="#">MODIFY</a>
Users	2743	test inbound recording speak	---ALL-- beep agi-NVA_recording.agi.BOTH-----Y---N---Y---N---Y---Y	1	2	<a href="#">MODIFY</a>
Campaigns	after_call_survey_01	after_call_survey_01	---ALL-- sip-silence SPP_276_01_intro_penny	10	3	<a href="#">MODIFY</a>
Lists	after_call_survey_02	after_call_survey_02	---ALL-- NOINTsilence SPP_276_02_cd13	10	3	<a href="#">MODIFY</a>
Quality Control	after_call_survey_03_end	after_call_survey_03_end	---ALL-- sip-silence cm_sc_send_url.agi.test_cm_url	1	4	<a href="#">MODIFY</a>
Scripts	Agent_cm_lookup_test	Agent cm lookup test	---ALL-- please_enter_id_number	10	2	<a href="#">MODIFY</a>
Filters	Agent_login_test	Agent login test	---ALL-- sip-silence	1	4	<a href="#">MODIFY</a>
Inbound	Agent_title_test	Agent title variable test	---ALL-- pls-ent-num-transfer	10	1	<a href="#">MODIFY</a>
Show In-Groups	AGI_RECORDING	Plays recID	---ALL-- beep agi-NVA_recording.agi.BOTH-----Y---N---Y---N---Y---Y	1	1	<a href="#">MODIFY</a>
Add A New In-Group	areacode_routing_test	areacode_routing_test	---ALL-- sip-silence	1	3	<a href="#">MODIFY</a>
Copy In-Group	callcard_dialin	CallCard Dail-in test	---ALL-- sip-silence	10	1	<a href="#">MODIFY</a>
Show Email Groups	callcard_dialin_es	CallCard Dail-in test ES	---ALL-- sip-silence	10	1	<a href="#">MODIFY</a>
Add New Email Group	CM_callmenu	CM test call menu	---ALL-- call-terminated	10	2	<a href="#">MODIFY</a>
Copy Email Group	CM_callmenu_2	CM test call menu 2	---ALL-- pls-ent-num-transfer	10	2	<a href="#">MODIFY</a>
Show Chat Groups	cm_sc_areacode_test	test for cm_sc_areacodeagi	---ALL-- sip-silence	1	1	<a href="#">MODIFY</a>
Add New Chat Group	cross_cluster_communication_test_insert	Cross Cluster Communication lead search insert test	---ALL-- wait-moment cm_sc_ccc_lookup_insert.agi.ccc_test---8199	10	4	<a href="#">MODIFY</a>
Copy Chat Group	default--agent	agent phones restricted to only internal extensions	---ALL-- sip-silence	20	1	<a href="#">MODIFY</a>
Show DIDs	defaultlog	logging of outbound calls from agent phones	---ALL-- sip-silence	20	3	<a href="#">MODIFY</a>
Add A New DID	defaultlogX	logging of outbound calls from agent phones	---ALL-- sip-silence	20	1	<a href="#">MODIFY</a>
Copy DID	dnc_test	DNC test	---ALL-- donotcall1	10	2	<a href="#">MODIFY</a>
PA Extensions	Employee_Entru_Test	ICLQ Employee Entry Test	---ALL-- sip-silence	1	3	<a href="#">MODIFY</a>

Figure 19. Call Menus List

## Dialer CALL MENUS

Also in the In-Groups section are the Call Menu functions which give you the ability to create treeed IVR (Interactive Voice Response) Menus, for instance: “Press 1 for sales or press 2 for technical support”, and have those options send the call to different destinations.

## Add a New Call Menu

You can get to the Add Call Menu screen by clicking on the "ADD A NEW CALL MENU" link in the INBOUND section. When adding a new Call Menu you must make sure that you set the Menu ID and Menu name or the submission will not be accepted. Also, please make sure that the Menu ID you have chosen does not have any spaces or punctuation characters other than letters, numbers, underscores “\_” or dashes “-”. Once you create a Call Menu you will not be able to change that Menu ID unless you delete the Call Menu and re-create it again with a different Menu ID. You cannot have duplicate Menu IDs in the system, and Menu IDs must be between 2 and 50 characters in length.

Call Menus can give options to send calls to:

- Extensions in any context in the dialplan (including Asterisk-based IVRs)
- Phones that are specified in the Dialer interface
- Dialer In-Groups
- Dialer Call Menus
- Dialer DIDs
- Any AGI script on the system
- Hangup after playing a message

- Or simply hangup the call

## Copy A Call Menu

This page will allow you to copy all of an existing Call Menu's settings into a new Call Menu. You just need to enter a new Menu ID, Menu name and a source Call Menu to take the other settings from.

## Modify Call Menu

*(screen shot of Modify Call Menu screen available in the Appendix)*

**Menu ID** - This is the ID for this step of the call menu. This will also show up as the context that is used in the dialplan for this call menu.

**Menu Name** - This field is the descriptive name for the call menu.

**Admin User Group** - This is the administrative user group for this Call Menu, it allows admin viewing of this Call Menu to be restricted by user group. Default is --ALL-- which allows any admin user with user group Call Menu permissions to view this Call Menu entry.

**Menu Prompt** - This field contains the file name of the audio prompt to play at the beginning of this menu. You can enter multiple prompts in this field and the other prompt fields by separating them with a pipe character. To prevent the caller from interrupting the message with a key press, place NOINT directly in front of the prompt filename (no spaces). It should not be part of the filename itself, but instead serves as a special flag for the system. You may also use special purpose .agi scripts in this field as well like the cm\_date.agi script, discuss with your administrator for more details. Another special prefix flag is NOPLAY, which can be used for debug purposes or if you are using Answer configuration on your system for inbound calls.

**Menu Timeout** - This field is where you set the timeout in seconds that the menu will wait for the caller to enter in a DTMF choice. Setting this field to zero 0 will mean that there will be no wait time after the prompt is played.

**Menu Timeout Prompt** - This field contains the file name of the audio prompt to play when the timeout has been reached. Default is NONE to play no audio at timeout.

**Menu Invalid Prompt** - This field contains the file name of the audio prompt to play when the caller has selected an invalid option. Default is NONE to play no audio at invalid.

**Menu Repeat** - This field is where you define the number of times that the menu will play after the first time if no valid choice is made by the caller. Default is 1 to repeat the menu once.

**Menu Time Check** - This field is where you can select whether to restrict the Call Menu access to the specific hours set up in the selected Call Time. If the Call Time is blank, this setting will be ignored. Default is 0 for disabled.

**Call Time** - This is the Call Time ID that will be used to restrict calling times if the Menu Time Check option is enabled.

**Track Calls in Real-Time Report** - This field is where you can select whether you want the call to be tracked in the Real-time screen as an incoming IVR type call. Default is 1 for active.

**Tracking Group** - This is the ID that you can use to track calls to this Call Menu when looking at the IVR Report. The list includes CALLMENU as the default as well as all of the In-Groups.

**Log Key Press** – When enabled, this option will log the DTMF key press by the caller in this Call Menu. Default is 0 for disabled.

**Log Field** - If the Log Key Press option is enabled, this optional setting can allow the response to also be stored in this list field. *vendor\_lead\_code, source\_id, phone\_code, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, alt\_phone, email, security\_phrase, comments, rank, owner, status, user.* Default is NONE for disabled.

**Alt DTMF Log** - This option if enabled will log the DTMF key press by the caller in this Call Menu to a separate database table. Default is 0 for disabled. This option must be enabled in the Admin -> System Settings to appear on this screen.

**Question** - If the Alt DTMF Log option is enabled, this is the question number that the response will be logged to. Default is blank for disabled.

**Beginning Answer Signal** - If enabled, an Answer signal will be sent to the call before the Menu Prompt is played. Default is Y.

**Log Field** - If the Log Key Press option is enabled, this allows the responses to also be stored in the indicated list field. *vendor\_lead\_code, source\_id, phone\_code, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, alt\_phone, email, security\_phrase, comments, rank, owner, status, user.* Default is NONE for disabled.

**Option Value** - This field is where you define the menu option, possible choices are: 0,1,2,3,4,5,6,7,8,9,\*,#,A,B,C,D,TIMECHECK. The special option TIMECHECK can be used only if you have Menu Time Check enabled and there is a Call Time defined for the Menu. To delete an Option, just set the Route to REMOVE and the option will be deleted when you click the SUBMIT button. TIMEOUT will allow you to set what happens to the call when it times out with no input from the caller. INVALID will allow you to set what happens when the caller enters an invalid option. INVALID\_2ND and 3RD can only be active if INVALID is not used, it will wait until the second or third invalid entry by the caller before it executes the option.

**Option Description** - This field is where you can describe the option, this description will be put into the dialplan as a comment above the option.

**Option Route** - This menu contains the options for where to send the call if this option is selected: CALLMENU,INGROUP,DID,HANGUP,EXTENSION,PHONE, VOICEMAIL & VMAIL\_NO\_INST. For CALLMENU, the Route Value should be the Menu ID of the Call Menu that you want the call sent to. For INGROUP, the In-Group that you want the call to be sent to needs to be selected as well as the other 5 options that need to be set to properly route a call to an Inbound Group. For DID, the Route Value needs to be the DID pattern that you want to send the call to. For HANGUP,

the Route Value can be the name of an audio file to play before hanging up the call. For EXTENSION, the Route Value needs to be the dialplan extension you want to send the call to, and the Route Value Context is the context that extension is located in, if left blank the context will default to default. For PHONE, the Route Value needs to be the phone login value for the phones entry that you want to send the call to. For VOICEMAIL & VMAIL\_NO\_INST, the Route Value needs to be the voicemail box number, the unavailable message will be played.(VMAIL\_NO\_INST is the same as VOICEMAIL except the instructions are not played to the caller with the Voicemail box message is played) For AGI, the Route Value needs to be the agi script and any values that need to be passed to it. NOTE: When Dialer performs a lead lookup using the cm\_lookup.agi it also has the ability to update the Phone Number on the lead to the CID displayed on the incoming call.

**Option Route Value** - This field is where you enter the value that defines where in the selected Option Route that the call is to be directed to.

**Option Route Value Context** - This field is optional and only used for EXTENSION Option Routes.

**Call Menu In-Group Settings** - If the route is set to INGROUP then there are many options that you can set to define how the call is sent to into the queue. In-Group is the inbound group that you want the call to go to. Handle Method is the way you want the call to be handled, Click here to see a list of the available handle methods. Search Method defines how the queue will find the next agent, recommend leave this on LB. List ID is the list that the new lead is inserted into, also if the Method is not a LOOKUP method and the lead is not found. Campaign ID is the campaign to search lists through if one of the RC methods is used. Phone Code is the phone\_code field entry for the lead that is inserted with. VID Enter Filename is used if the Method is set to one of the VIDPROMPT methods, it is the audio prompt played to ask the customer to enter their ID. VID ID Number Filename is used if the Method is set to one of the VIDPROMPT methods, it is the audio prompt played after customer enters their ID, something like YOU HAVE ENTERED. VID Confirm Filename is used if the Method is set to one of the VIDPROMPT methods, it is the audio prompt played to confirm their ID, something like PRESS 1 TO CONFIRM AND 2 TO REENTER. VID Digits is used if the Method is set to one of the VIDPROMPT methods, if it is set to a number it is the number of digits that must be entered by the customer when prompted for their ID, if set to empty or X then the customer will have to press pound or hash to finish their entry of their ID. If you are using the cm\_phonesearch.agi in this Call Menu, you can set the B option to use the special DYNAMIC\_INGROUP\_VAR in-group for that script to work properly.

**Custom Dialplan Entry** - This field allows you to enter in any dialplan elements that you want for the Call Menu.

**Call Menu qualify SQL option** - Allows filtering of campaign or in-group transferred calls. This field allows you to input SQL - Structured Query Language - database fragments, like with Filters, to determine whether this call menu should play for the caller or not. This feature only works if the call has the caller ID name set prior to being sent to this call menu, either as an outbound survey transfer, or through the use of a drop call menu for an In-Group call. If there is a match, the call will proceed as normal. If there is no match, the call will go to the D option or the invalid option if no D option is set. You cannot use single-quotes in this field, only double-quotes if they are needed. Default is empty for disabled.

NOTE: A new agent\_monitor.agi script was added to replace the agi-phone\_monitor script for agent

monitoring. Please read Tutorial W in this manual or the AGENT\_MONITOR.txt document (available at [http://dialer.org/docs/AGENT\\_MONITOR.txt](http://dialer.org/docs/AGENT_MONITOR.txt)) for more information on the dialplan changes necessary to use this script.

**Figure 20. Filter Phone Groups**

FPG ID	FPG NAME	DESCRIPTION	ADMIN GROUP	PHONES COUNT	MODIFY
282483	G2	G2	--ALL--	5	<a href="#">MODIFY</a>
9000	jons filter		--ALL--	1	<a href="#">MODIFY</a>
99test	test		--ALL--	21	<a href="#">MODIFY</a>
INT_TEST	VWaaaaoooooooooaaa	Gobbbbb	--ALL--	2	<a href="#">MODIFY</a>
lyftzip	lyft zipcodes list		--ALL--	30027	<a href="#">MODIFY</a>
TEST_FILTER_PHONE	Test filter Group name	This is a testing filter group name	--ALL--	4	<a href="#">MODIFY</a>
testfpg	testfpg	testfpg	--ALL--	1	<a href="#">MODIFY</a>
FIL	FIL	FIL	--ALL--	0	<a href="#">MODIFY</a>
FIL@*@&*(	FIL@*(@*)!	FIL(((())#&!#&#	--ALL--	0	<a href="#">MODIFY</a>

## Dialer Filter Phone Groups

Filter Phone Group Allows you to uniquely route incoming phone calls based entirely on the their caller ID. The Filter Phone Group is simply a group of phone numbers. If the DID has the “Filter Inbound Number” set to “GROUP”, it will look through all of the phone numbers in the indicated Filter Phone Group. If the incoming caller ID matches a number in the group, it routes the call to the specified filter location.

## Add Filter Phone Group

To create a new filter group, click on the "ADD FILTER PHONE GROUP" link in the INBOUND section.

**Filter Phone Group ID** - This is the ID of the filter group, and should be between 2 and 20 characters and have no punctuation except for underscore.

**Filter Phone Group Name** - This is the name of the Filter Phone Group and is displayed with the ID in select lists where this feature is used. This field should be between 2 and 40 characters.

**Filter Phone Group Description** - This is the description of the Filter Phone Group, it is purely for notation purposes only and is not a required field.

**Admin User Group** - This is the administrative user group for this Filter Group, it allows admin viewing of this Filter Group to be restricted by user group. Default is --ALL-- which allows any admin

user with user group Filter Group permissions to view this Filter Group entry.

## **Add-Delete FPG Number**

You can add & delete phone numbers from the Filter Phone Groups. The process is very similar, in practice, to adding & deleting numbers from the DNC List. Select the Filter Phone Group you wish to add the phone number to. Enter the phone number in the “Phone Numbers” field (one per line, no spaces or dashes), select “add” and click submit. If the number is already in the Filter Phone Group list you will see a duplicate message. The same process also works for removing phone numbers from the Filter Phone Group lists. To use this functionality you must have the proper permissions in the User settings.

The “Download Numbers In This List To A File” pulldown at the bottom allows you do export a complete list of Filter Phone Group numbers. Select the desired list in the pulldown, click submit, and it will export the complete list in .TXT format. We recommend opening this file with Excel, OpenOffice.org Calculator, other spreadsheet program for best viewing results.

USER GROUP	GROUP NAME	USERS	ACTIVE	2ND	FORCE TIMECLOCK	MODIFY
5000	admin user group test	2	2	0	N	<a href="#">MODIFY</a>
7457	7457	3	3	0	N	<a href="#">MODIFY</a>
ZADMIN	7 ADMIN	1	1	0	N	<a href="#">MODIFY</a>
ADMIN	VICIDIAL ADMINISTRATORS	80	76	0	N	<a href="#">MODIFY</a>
AGENTS	VICIDIAL AGENTS	10	10	2	N	<a href="#">MODIFY</a>
APIUSER	APIUSER	0	0	0	N	<a href="#">MODIFY</a>
april	april test	0	0	0	N	<a href="#">MODIFY</a>
email	email test	0	0	0	N	<a href="#">MODIFY</a>
Example	Conference Example	6	6	0	N	<a href="#">MODIFY</a>
INGROUP_REPORT	Test in-group report limited group	1	1	0	N	<a href="#">MODIFY</a>
INT_TEST	TEEESSsTTTTtttNGG	3	3	0	N	<a href="#">MODIFY</a>
MIKESGROUP	Mikes Group	8	8	0	N	<a href="#">MODIFY</a>
NEWGRP	Test	4	4	0	N	<a href="#">MODIFY</a>
stacey	stacey practicing	3	3	0	N	<a href="#">MODIFY</a>
TEMPTEST	Testing	2	2	0	N	<a href="#">MODIFY</a>
Test	test	0	0	0	N	<a href="#">MODIFY</a>
TEST_GROUP	test group	0	0	0	N	<a href="#">MODIFY</a>
TRAINAGENTS	Training Agents	1	1	0	N	<a href="#">MODIFY</a>
video	video agents 2	1	1	0	N	<a href="#">MODIFY</a>

Figure 21. User Groups List

## Dialer USER GROUPS

User Groups are used for features like shift enforcement, agent screen display options, administrative report and campaign viewing permissions and a few other features.

When you click on the USER GROUPS link on the left side bar menu of the admin screen you will enter the User Groups section. This starts with a full listing of every Dialer user group in the system with their group ID, name and a link to the user group modification page. We will first look at adding a new user group.

### Add a New User Group

You can get to the Add User Group screen by clicking on the "ADD USER GROUP" link at the top of the USER GROUP section. When adding a new user group you must make sure that you set the group and description or the submission will not be accepted. Also, please make sure that the group you have chosen does not have any spaces. You cannot have duplicate user groups in the system, and user group IDs must be between 2 and 20 characters in length.

### Modify User Group

(screen shot of the Modify User Group screen available in the Appendix)

**User Group** - This is the short name of a Dialer User group, try not to use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

**Description** - This is the description of the Dialer user group max of 40 characters.

**Force Timeclock Login** - This option allows you to not let an agent log in to the Dialer agent interface if they have not logged into the timeclock. Default is N. There is an option to exempt admin users, levels 8 and 9.

**Shift Enforcement** - This setting allows you to restrict agent logins based upon the shifts that are selected below. OFF will not enforce shifts at all. START will only enforce the login time but will not affect an agent that is running over their shift time if they are already logged in. ALL will enforce shift start time and will log an agent out after they run over the end of their shift time. Default is OFF. There is an option to exempt admin users, levels 8 and 9.

**Allowed Campaigns** - This is a selectable list of Campaigns to which members of this user group can log in to. The ALL-CAMPAIGNS option allows the users in this group to see and log in to any campaign on the system.

**Group Shifts** - This is a selectable list of shifts that can restrict the agents login time on the system.

**Agent Status Viewable Groups** - This is a selectable list of User Groups and user functions to which members of this user group can view the status of as well as transfer calls to inside of the agent screen. The ALL-GROUPS option allows the users in this group to see and transfer calls to any user on the system. The CAMPAIGN-AGENTS option allows users in this group to see and transfer calls to any user in the campaign that they are logged into. The NOT-LOGGED-IN-AGENTS option allows all users in the system to be displayed, even if they are not logged-in currently.

**Agent Status View Time** - This option defines whether the agent will see the amount of time that users in their agent sidebar have been in their current status. Default is N for no or disabled.

**Agent Call Log View** - This option defines whether the agent will be able to see their call log for calls handled through the Dialer agent screen. This can be enabled in the User Group screen or the User screen in Administration. Default is N for no or disabled.

**Agent Transfer Options** - These options allow for the disabling of specific buttons in the Transfer Conference section of the Agent interface. Default is Y for yes or enabled.

**Agent Fullscreen** - This option if set to Y will set the height and width of the Dialer agent screen to the size of the web browser window without any allowance for the Agents View, Calls in Queue View or Calls in Session view. Default is N for no or disabled.

**Script Override** - This option allows you to set a Script to be displayed on the agent screen if the corresponding campaign setting for User Group Script Override is enabled. If enabled here and at the campaign level, this will override any other script settings set for any calls. Default is blank.

**Agent Allowed Chat Groups** - This is a selectable list of User Groups and user functions to which members of this user group can view the status of as well as transfer calls to inside of the agent screen. The ALL-GROUPS option allows the users in this group to see and transfer calls to any user on initiate an internal chat to within the agent screen. The CAMPAIGN-AGENTS option allows users in this group to see and start chats with any user in the campaign that they are logged into.



**Allowed Reports** - If a user in this group is set to user level 7 or higher, then this feature can be used to restrict the reports that the users can view. Default is ALL. If you want to select more than one report then press the Ctrl key on your keyboard as you select the reports.

**Allowed Queue Groups** - This section enables you to define the Queue Groups that users within this User Group can view in the reports that use Queue Groups. Default is All Queue Groups.

**Reports Header Override** - This option allows you to define alternate report web page short headers for users within this User Group. The LOGO\_ONLY options will not display any other links on the top navigation bar. The ALT options are not active at this time. This feature currently only works with a few reports. Default is DISABLED.

**Home URL Override** - This option allows you to override the System Settings Admin Home URL. If the Reports Header Override setting above is enabled, then this URL will be used for the logo that is displayed when clicked. Default is blank for disabled.

NOTE: The following “Webphone” options will only show up if a Webphone is set up in Admin → System Settings

**Webphone URL Override** - This setting allows you to set an alternate webphone URL just for the members of one user group. Default is empty.

**Webphone System Key Override** - This setting allows you to set an alternate webphone System Key just for the members of one user group. Default is empty.

**Webphone Dialpad Override** - This setting allows you to activate or deactivate the dialpad on the webphone just for the members of one user group. Default is DISABLED. TOGGLE will allow the user to view and hide the dialpad by clicking a link.

**QC Allowed Campaigns** - A selectable list of Campaigns which members of this user group will be able to QC. The ALL-CAMPAIGNS option allows the users in this group to QC any campaign on the system.

**QC Allowed Inbound Groups** - A selectable list of Inbound Groups which members of this user group will be able to QC. The ALL-GROUPS option allows the users in this user group to QC any inbound group on the system.

**Admin IP Whitelist** - If enabled, this will restrict administration web screen use to only be allowed from the selected list of IP Addresses. Default is DISABLED.

**Agent IP Whitelist** - If enabled, this will restrict agent web screen use to only be allowed from the selected list of IP Addresses. Default is DISABLED.

**API IP Whitelist** - If enabled, this will restrict API use to only be allowed from the selected list of IP Addresses. Please note that some API functions need to be done from the servers themselves, so if you enable this, you may need to add internal server IP Addresses for those functions to continue to work. Default is DISABLED.

**Allowed User Groups** - This is a selectable list of User Groups to which members of this user group can view and possibly edit. User Groups can restrict access to almost all aspects of the system, from inbound DIDs to phones to voicemail boxes. The --ALL-- option allows the users in this group to see and log in to any record on the system if their user permissions allow for it.

**Allowed Call Times** - This is a selectable list of Call Times to which members of this user group can use in campaigns, in-groups and call menus. The --ALL-- option allows the users in this group to use all call times in the system.

**Users Within This User Group** – Displays the User ID, Full Name, User Level, and Active status of all agents assigned to the User group.

**Add Or Remove In-Group Selected For Active Users In This User Group** - Allows you assign or remove an In-Group from an entire User Group in one action. Otherwise In-Groups are assigned 1 agent at a time, in either the User or the In-Group modification page.

## **Delete User Group**

If the option is enabled, a manager can go to the bottom of the user group modification page and click on the "DELETE THIS USER GROUP" link to remove a user group from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS USER GROUP" link to remove the user group from the system.

## Group Hourly Report

You can get to the Group Hourly Report by clicking on the GROUP HOURLY link at the top of the USER GROUPS section. This will take you to the report screen where you need to select a user group, a disposition status you want a summary on, and the date and hour that you want those stats for. The results will appear in table form and will list the total calls taken by each agent in the group during that hour, the number of calls dispositioned with the status you defined in the form and how many calls of that status they dispositioned for the whole day. At the bottom of the table you will see totals for each of the tally columns as well as the form so that you can run another report if desired.

Figure 22. User Group, Bulk Group Change

The screenshot displays the 'User Group Bulk Change' interface. On the left is a dark blue sidebar with the 'ADMINISTRATION' header and a list of menu items: Reports, Users, Campaigns, Lists, Scripts, Filters, Inbound, User Groups (highlighted), Remote Agents, and Admin. Under 'User Groups', there are sub-items: Show User Groups, Add A New User Group, Group Hourly Report, and Bulk Group Change. The main content area is light blue and contains two forms. The first form is titled 'Change Users in this group:' and has two dropdown menus, both set to 'AGENTS - Agent Users', and a 'SUBMIT' button. The second form is titled 'Change ALL non-Admin Users to this group:' and has one dropdown menu set to 'AGENTS - Agent Users' and a 'SUBMIT' button. At the bottom of the main area, there is a 'script runtime: 0 seconds' indicator.

## Bulk Group Change

If you need to change all of the members of one user group to another user group, you can use the Bulk Group Change page that is the last sub-menu option under the User Groups section.

There are two options on this page, change one user group to another, or change all non-ADMIN user group users to another user group.

ADMINISTRATION	REMOTE AGENTS LISTINGS:							
	USER	LINES	SERVER	CONF-EXTEN	GROUP	STATUS	CAMPAIGN	MODIFY
	10000	1	10.10.10.15	8300	NONE	INACTIVE	TESTCAMP	<a href="#">MODIFY</a>

**Figure 23. Remote Agents List**

## ***Dialer REMOTE AGENTS***

There are two recommended uses for Remote Agents in Dialer . First, it is for inbound calls where an agent does not want to have to be connected to the session on the phone or cannot be at a computer to use the Dialer agent screen. Second, remote agents accounts can be used to do outbound auto-dial message-playing broadcast and survey campaigns. Setting up and running both of these scenarios are presented earlier in this manual in the tutorials section. If you have an agent working in a remote location, they do NOT have to use the Remote Agent functionality in Dialer , they can log in as a standard agent using the agent screen.

When you click on the REMOTE AGENTS link on the left side menu bar of the Admin screen you will enter the Remote Agents section. This starts with a full listing of every Dialer remote agent in the system with their Agent ID, number of lines, client server IP address, outgoing phone number for the agent, extension group, whether the remote agent is active, the campaign that the remote agent belongs to and a link to the remote agent modification page. We will first look at adding a new remote agent. NOTE: The agent API allows for hangup and transfer of calls sent to a Remote Agent as well as setting call dispositions. For more information read the AGENT\_API.txt doc.

NOTE: Remote Agents can be recorded, like any other agent. The Campaign Recording should be set to ALLFORCE, and recording should be enabled on their User page.

## **Add a New Remote Agent**

You can get to the Add a Remote Agent screen by clicking on the "ADD NEW REMOTE AGENTS"

link at the top of the REMOTE AGENTS section. When adding a new remote agent you must make sure that you set the user ID, number of lines and external extension as digits only or the submission will not be accepted. Also, please make sure that the user ID matches a user ID from Dialer . The way that multi-line remote agents works is that a new user is marked as logged in with an incremental number for the user starting at the user ID of the remote agent. For instance, if the user ID is given as 111 in the remote agent record and you define 3 lines for that agent, when the remote agent changes to ACTIVE there will be 3 accounts showing up as agents in the Real-time Campaign screen: R/111, R/112 and R/113(you do NOT have to create a new Dialer user record for each of these, just the first one). This is how multiple agents can be used with a single remote agent record, and this easily allows for multiple calls to be handled during auto-dial campaigns or in the case of a number being forwarded to a group of people on a hunt group of numbers on a traditional phone system. Because of this, you will want to make sure that the user IDs used for remote agents will not overlap with other Dialer User IDs already in the system.

## Modify Remote Agent

*(screen shot of the Modify Remote Agent screen available in the Appendix)*

It is important to remember that changing the status of a remote agent from ACTIVE to INACTIVE can take up to a minute to go into effect.

**User ID Start** - This is the starting User ID that is used when the remote agent entries are inserted into the system. This MUST be a valid User account in the system. If the Number of Lines is set higher than 1, this number is incremented by one until each line has an entry. Make sure you create a new Dialer user account with a user level of 4 or great if you want them to be able to use the Remote Agent login page (vdremote.php) for remote web access of this account. Dialer validates that the Remote Agent is an active user in the system, and the lines set will not overlap those of another Remote Agent.

**Number of Lines** - This defines how many remote agent entries the system creates, and determines how many lines it thinks it can safely send to the number below.

**Server IP** - A remote agent entry is only good for one specific server, this field indicates which server the entry will use.

**External Extension** - This is the number that you want the calls forwarded to. Make sure that it is a full dialplan number and that if you need a 9 at the beginning you put it in here. Test this first by dialing this number from a phone on the dialer.

**Extension Group** - If set to something other than NONE or empty; this will override the External Extension field and use the Extension Group entries that have the same extension group ID. This can allow round-robin sending of calls to a group of dialplan extension numbers. Default is NONE for deactivated.

**Status** - Here is where you turn the remote agent on and off. As soon as the agent is ACTIVE, the system assumes that it can send calls to it. It may take up to one minute once you change the status to INACTIVE to stop receiving calls.

**Campaign** - Here is where you select the campaign that these remote agents will be logged into.

Inbound needs to use a CLOSER campaign and select the inbound campaigns below that you want it to receive calls from.

**On-Hook Agent** - This option is only used for inbound calls going to this remote agent. This feature calls the remote agent and will not send the customer to the remote agent until the line is answered. Default is N for disabled.

**On-Hook Ring Time** - This option is only used when the On-Hook Agent field above is set to Y and then only for inbound calls coming to this remote agent. This is the number of seconds each call attempt will ring trying to get an answer. It is recommended that you set this to a few seconds less than it takes for a call to be sent to voicemail. Default is 15.

**Inbound Groups** - Here is where you select the inbound groups you want it to receive calls from, if you have selected a CLOSER campaign.

## Remote-Agent daily stats

Shows total calls and maximum number of concurrent calls per day.

## Delete Remote Agent

If the option is enabled, a manager can go to the bottom of the remote agents modification page and click on the "DELETE THIS REMOTE AGENT" link to remove a remote agent record from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS REMOTE AGENT" link to remove the remote agent from the system.

## Extension Groups

Extension groups allow you to send calls going to a Remote Agent to be distributed among several different dialplan extensions. You must first create a new Extension Group, then you need to add extensions to that extension group, with an associated rank so that the system will know the order to send calls to them in.

## DID Remote Agent Extension Overrides

This section(which can be found in the Inbound → RA Extensions page) allows you to enable DIDs to have extension overrides for remote agent routed calls through in-groups. The User Start must be a valid Remote Agent User Start or if you want the Extension Override entry to work for all calls then you can use ---ALL--- in the User Start field. If there are multiple entries for the same DID and User Start then the active entries will be used in a round robin method.

## ADMIN – Advanced Administration

This next section covers a different Administrative section that you may not have access to, but it is important to know how to use if you need to set up agents that would be using their own phones at home either through VOIP or their regular phone lines. Every Dialer seat must have a phone entry in order to login to the Dialer client. The exception to this is if you have the CALL-IN feature enabled on your Dialer system that allows agents to dial into the Dialer system instead of having the system call them when they log in. For more information on the CALL-IN feature see the notes at the bottom of the PHONE section below. Also covered are configuration or Music on Hold, Voicemail boxes, the Audio Store and several other system configuration options.

When you click on the “Admin” link on the left side menu bar of the Admin screen you will enter the Higher-level Dialer Admin section. This contains the second sub-section which has the Phones sub-section with a full listing of every Dialer phone record in the system with their phone extension, protocol, server IP, Dial Plan extension, status, phone name, voicemail message count, Admin User Groups, and a link to the phone modification page. We will first look at adding a new phone.

Figure 24. Admin Section Welcome Screen



ADMINISTRATION										
PHONE LISTINGS:										
RECORDS 0 - 500 NEXT 76 <a href="#">show all phones</a>										
EXTEN	-#-	PROTO	SERVER	DIAL PLAN	STATUS	NAME	VMAIL	GROUP	LINKS	
cc112		SIP	192.168.198.5	112	112	ACTIVE	station 112	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc124		SIP	192.168.198.5	124	124	ACTIVE	station 124	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc125		SIP	192.168.198.5	125	125	ACTIVE	station 125	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc126		SIP	192.168.198.5	126	126	ACTIVE	station 126	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc127		SIP	192.168.198.5	127	127	ACTIVE	station 127	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
sjptest		SIP	192.168.198.5	55643	55643	ACTIVE	sip test	0 0	TEST_GROUP	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc129		SIP	192.168.198.5	129	129	ACTIVE	station 129	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc130		SIP	192.168.198.5	130	130	ACTIVE	station 130	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc131		SIP	192.168.198.5	131	131	ACTIVE	station 131	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc123		SIP	192.168.198.5	123	123	ACTIVE	station 123	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc122		SIP	192.168.198.5	122	122	ACTIVE	station 122	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc121		SIP	192.168.198.5	121	121	ACTIVE	station 121	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc113		SIP	192.168.198.5	113	113	ACTIVE	station 113	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc114		SIP	192.168.198.5	114	114	ACTIVE	station 114	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc115		SIP	192.168.198.5	115	115	ACTIVE	station 115	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc116		SIP	192.168.198.5	116	116	ACTIVE	station 116	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc117		SIP	192.168.198.5	117	117	ACTIVE	station 117	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc118		SIP	192.168.198.5	118	118	ACTIVE	station 118	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc119		SIP	192.168.198.5	119	119	ACTIVE	station 119	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc120		SIP	192.168.198.5	120	120	ACTIVE	station 120	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc132		SIP	192.168.198.5	132	132	ACTIVE	station 132	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc133		SIP	192.168.198.5	133	133	ACTIVE	station 133	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc134		SIP	192.168.198.5	134	134	ACTIVE	station 134	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc146		SIP	192.168.198.5	146	146	ACTIVE	station 146	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc147		SIP	192.168.198.5	147	147	ACTIVE	station 147	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>
cc148		SIP	192.168.198.5	148	148	ACTIVE	station 148	0 0	---ALL---	<a href="#">MODIFY</a>   <a href="#">STATS</a>

Figure 25. Admin Phones List

## ADMIN - PHONES

### Add a New Phone

You can get to the Add Phone screen by clicking on the "ADD A NEW PHONE" link on the left side menu bar of the admin page. The add a phone screen has the first 17 fields that are needed to have a valid phone record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new phone you must make sure that you set the extension, dialplan number, server\_ip, login, password, full name, protocol and local GMT, or the submission will not be accepted. Also, please make sure that the extension you have chosen does not have any spaces or special punctuation, only letters, numbers and dashes. If you are setting up a channelbank (Zap or DAHDI protocol) phone then you need to make sure that your system administrator has set up the account on the system before you set up the phone account. SIP and IAX protocol phones will have their Asterisk settings created automatically within one minute of submitting the form. EXTERNAL protocol phone entries do not require any Asterisk configuration because they use the dialplan to place calls out.

NOTE: For SIP and IAX phones, the registration password that you will use is set in the "Registration Password" field, not the "Login Password" field. These are often confused.

### Modify Phones

*(screen shot of the Modify Phone screen available in the Appendix)*

From the LIST ALL PHONES screen you can click on the MODIFY link for any phone entry to modify it's record.

**Phone extension** - This field is where you put the phone's name as it appears to Asterisk, not including the protocol or slash at the beginning. For Example: for the SIP phone SIP/test101 the Phone extension would be test101. Also, for IAX2 phones: IAX2/IAXphone1@IAXphone1 would be IAXphone1 with a protocol of IAX2. For Zap agent phones(channelbank phones) make sure you put the full channel: Zap/25-1 would be 25-1. Another note, make sure you set the Protocol below correctly for your type of



phone(Zap/IAX2/SIP/EXTERNAL). For SIP, PJSIP and IAX phones, this field should not contain any dashes.

**Dial Plan number** - This field is for the number you dial to have the phone ring. This number is defined in the extensions.conf file of your Asterisk server

**Voicemail Box** - This field is for the voicemail box that the messages go to for the user of this phone. We use this to check for voicemail messages and for the user to be able to use the VOICEMAIL button on the Agent interface.

**Outbound CallerID** - This field is where you would enter the caller ID number that you would like to appear on outbound calls placed from the astguiclient web-client. Although, once the agent logs into a campaign, the “Campaign Call ID” will override this setting. This does not work on RBS, non-PRI, T1/E1s or POTS telephone lines.

**Outbound Alt CallerID** - This optional field is where you can enter an alternate callerID number that can be used in certain cases in place of the original Outbound Caller ID number. Using this will require custom dialplan entries for it to work. Default is blank.

**Admin User Group** - This is the administrative user group for this Phone extension, this allows admin viewing of this to be restricted by user group. Default is --ALL-- which allows any admin user to view this particular Phone extension.

**Phone IP address** - This field is for the phone's IP address if it is a VOIP phone. This is an optional field

**Computer IP address** - This field is for the user's computer IP address. This is an optional field

**Server IP** - This menu is where you select which server the phone is active on.

**Agent Screen Login** - The login used for the phone user to login to the client applications.

**Login Password** - The password used for the phone user to login to the web-based client applications. IMPORTANT, this is the password only for the agent web interface phone login, to change the sip.conf or iax.conf password, or secret, for this phone device you need to modify the Registration Password in the next field.

**Registration Password** - This is the secret, or password, for the phone in the iax or sip auto-generated conf file for this phone. Limit is 20 characters alphanumeric, dash, and underscore accepted. Default is test. Formerly called “Conf File Secret”. A strong registration password should be at least 8 characters in length and have lower case and upper case letters as well as at least one number.

**Set As Webphone** - Setting this option to Y will attempt to load a web-based phone when the agent logs into their agent screen. The Y\_API\_LAUNCH option can be used with the agent API to launch the webphone in a separate Iframe or window. Default is N.

**Webphone Dialpad** - This setting allows you to activate or deactivate the dialpad for this webphone. Default is Y for enabled. TOGGLE will allow the user to view and hide the dialpad by clicking a link.

This feature is not available on all webphone versions. TOGGLE\_OFF will default to not show the dialpad on first load, but will allow the user to show the dialpad by clicking on the dialpad link.

**Webphone Auto-Answer** - This setting allows the web phone to be set to automatically answer calls that come in by setting it to Y, or to have calls ring by setting it to N. Default is Y.

**Webphone Dialbox** - For the WebRTC phone, this setting will allow the number to dial input box to be active. Default is Y.

**Webphone Mute** - For the WebRTC phone, this setting will allow the mute button to be active. Default is Y.

**Webphone Volume** - For the WebRTC phone, this setting will allow the volume buttons to be active. Default is Y.

**Webphone Debug** - For the WebRTC phone, this setting will show debug output. Default is N.

**Webphone Layout** - For the WebRTC phone, this setting will allow you to use an alternate layout. Default is blank.

**Webphone Extra Settings** - This option allows you to define additional webphone settings that will be passed from the agent screen to the webphone that is loaded for that agent. See the VICIPHONE\_SETTINGS settings container for more information.

**Use External Server IP** - If using as a web phone, you can set this to Y to use the servers External IP to register to instead of the Server IP. Default is empty.

**Status** - The status of the phone in the system, ACTIVE and ADMIN allow for GUI clients to work. ADMIN allows access to this administrative web site. All other statuses do not allow GUI client or Admin web access.

**Active Account** - Whether the phone is active to put it in the list in the GUI client.

**Phone Type** - Purely for administrative notes.

**Full Name** - Used by the GUIclient in the list of active phones.

**Email** - An email account that is associated with this phone entry. This is also the email address that voicemails will be sent to if populated.

**Delete Voicemail After Email** - The email address associated with this phone entry. This is used for voicemail settings. Upon placing an email in this field, you are activating the process to drop voice mails to the email address entered.

**Voicemail Zone** - This setting allows you to set the local timezone for this voicemail box. This is useful when the agent using the voicemail is not in the same time zone the dialers are set to. Default is set in the System Settings.

**Voicemail Options** - This optional setting allows you to define additional voicemail settings. It is recommended that you leave this blank unless you know what you are doing.

**Voicemail Greeting** - This optional setting allows you to define a voicemail greeting audio file from the audio store. Default is blank.

**Voicemail Instructions** -This setting allows you to define if the voicemail instructions will play after the voicemail greeting when a call rings on the agent extension and times out to voicemail. Default is Y.

**Show VM on Summary Screen** -This option will display this Voicemail Box information on the summary page seen when logging into the administration page. It will show the box name, new message count, old count, and total messages in the box. Note the table will not be shown unless you have set at least one mailbox to Y. Default is N for off.

**Unavailable Dialplan Forward** -If this field is populated, any calls sent to this phone that go unanswered will be sent to a dialplan extension instead of going to the phone voicemail box. If context is left blank then the call will go to the extension at the default context. Default is blank for disabled.

**Music on Hold Suggest** - This option will allow you to define a specific Music on Hold context for the system to use for the customer to hear if the user of this phone places a customer on hold through their phone, not through the Agent Screen. Default is blank for disabled.

**Company** - Purely for administrative notes.

**Picture** - Not yet Implemented.

**New Messages** - Number of new voicemail messages for this phone on the Asterisk server.

**Old Messages** - Number of old voicemail messages for this phone on the Asterisk server.

**Client Protocol** - The protocol that the phone uses to connect to the Asterisk server: SIP, PJSIP, IAX2, Zap. Also, there is EXTERNAL for remote dial numbers or speed dial numbers that you want to list as phones.

**Local GMT** - The difference from Greenwich Mean time, or ZULU time where the phone is located. DO NOT ADJUST FOR DAYLIGHT SAVINGS TIME. This is used by the Dialer campaign to accurately display the time and customer time.

**Phone Ring Timeout** - This is the amount of time, in seconds, that the phone will ring in the dialplan before sending the call to voicemail. Default is 60 seconds.

**On-Hook Agent** - This option is only used for inbound calls going to an agent logged in with this phone. This feature will call the agent and will not send the customer to the agents session until the line is answered. Default is N for disabled.

**Manager Login** - This is the login that the GUI clients for this phone will use to access the Database where the server data resides. NOT USED ANYMORE.

**Manager Secret** - This is the password that the GUI clients for this phone will use to access the Database where the server data resides. NOT USED ANYMORE.

**Agent Default User** – This field places a default value in the Dialer user field whenever this phone user opens the Dialer client application. Leave blank for no user.

**Agent Default Pass** - This field places a default value in the Dialer password field whenever this phone user opens the Dialer client application. Leave blank for no pass.

**Agent Default Campaign** - This is to place a default value in the Dialer campaign field whenever this phone user opens the Dialer client application. Leave blank for no campaign.

**Park Exten** - This is the default Parking extension for the client applications. Verify that a different one works before making any changes.

**Conf Exten** - This is the default Conference park extension for the client applications. Verify that a different one works before making any changes.

**Agent Park Exten** - This is the default Parking extension for Dialer client applications. Verify that a different one works before making any changes.

**Agent Park File** - This is the default Dialer park extension file name for the client applications. Verify that a different one works before making any changes. limited to 10 characters.

**Monitor Prefix** - This is the dialplan prefix for monitoring of Zap channels automatically within the astGUIClient app. Only change according to the extensions.conf ZapBarge extensions records.

**Recording Exten** - This is the dialplan extension for the recording extension that is used to drop into meetme conferences to record them. It usually lasts up to one hour if not stopped. verify with extensions.conf file before changing.

**VMAIL Main Exten** - This is the dialplan extension going to check your voicemail. verify with extensions.conf file before changing.

**VMAIL Dump Exten** - This is the dialplan prefix used to send calls directly to a user's voicemail from a live call in the astGUIClient application. verify with extensions.conf file before changing.

**VMAIL Dump Exten NI** -This is the dial plan prefix used to send calls directly to a user voicemail from a live call in the astGUIClient app. This is the No Instructions setting.

**Exten Context** - This is the dialplan context that this phone primarily uses. It is assumed that all numbers dialed by the client applications are using this context so it is a good idea to make sure this is the most wide context possible. Verify with extensions.conf file before changing.

**Phone Context** - The dial plan context this phone will use to dial out. If you are running a call center and you do not want your agents to be able to dial out outside of the Dialer application for example, then you would set this field to a dialplan context that does not exist, something like agent-nodial.

default is default.

**Allowed Codecs** - You can define a comma delimited list of codecs to be set as the default codecs for this phone. Options for codecs include ulaw, alaw, gsm, g729, speex, g722, g723, g726, ilbc, opus, slin, g719,... Some of these codecs might not be available on your system, like g729, g726 or opus. If the field is empty, then the system default codecs or the phone entry above this one will be used for the allowable codecs. Default is empty.

**Allowed Codecs With Template**- Setting this option to 1 will include the codecs defined above, even if a conf file template is used. Default is 0.

**DTMF send Channel** - This is the channel string used to send DTMF sounds into meetme conferences from the client applications. Verify the exten and context with the extensions.conf file.

**Outbound Call Group** - This is the channel group that outbound calls from this phone are placed out of. There are a couple routines in the client applications that use this. For Zap channels you want to use something like Zap/g2 , for IAX2 trunks you would want to use the full IAX prefix like IAX2/VICItest1:secret@10.10.10.15:4569. Verify the trunks with the extensions.conf file, it is usually what you have defined as the TRUNK global variable at the top of the file. For most Dialer installations you will not need to set this field.

**CallerID URL** - This is the web address of the page used to do custom caller ID lookups in the astguiclient web-client application. default testing address is:

[http://astguiclient.sf.net/test\\_callerid\\_output.php](http://astguiclient.sf.net/test_callerid_output.php)

**Agent Default URL** - This is the web address of the page used to do custom Dialer Web Form queries. default testing address is: [http://astguiclient.sf.net/test\\_Dialer\\_output.php](http://astguiclient.sf.net/test_Dialer_output.php)

**NVA Call URL** -This is the optional web URL that can be used together with the NVA agi script in a Call Menu to log phone calls made outside of the agent screen. Variables that can be used with this feature are- phone\_number, uniqueid, lead\_id, extension, server\_ip, entry\_date, modify\_date, status, user, vendor\_lead\_code, source\_id, list\_id, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, called\_count, last\_local\_call\_time, rank, owner, campaign\_id, list\_description, recording\_id, recording\_filename.

**NVA Search Method** -If this phone dials through the NVA agi script in a Call Menu, and the NVA agi option is set to use the phone NVA Search Method, this is where that is defined.

**NVA Error Filename** -If this phone dials through the NVA agi script in a Call Menu, this is the error file that is played for the user of this phone if an error occurs.

**NVA New List ID** -If this phone dials through the NVA agi script in a Call Menu, this is the list ID that a new lead is inserted into if the phone number is not found and the NVA option to insert a new lead is set to Y. Default is 995.

**NVA New Phone Code** -If this phone dials through the NVA agi script in a Call Menu, this is the phone code that a new lead is inserted with if the phone number is not found and the NVA option to

insert a new lead is set to Y. Default is 1.

**NVA New Status** -If this phone dials through the NVA agi script in a Call Menu, this is the status that a new lead is inserted with if the phone number is not found and the NVA option to insert a new lead is set to Y. Default is NVAINS.

**Call Logging** - This is set to true if the call\_log.agi file is in place in the extensions.conf file for all outbound and hangup 'h' extensions to log all calls. This should always be 1 because it is mandatory for many astGUIclient and Dialer features to work properly. NOT USED ANYMORE.

**User Switching** - Set to true to allow user to switch to another user astguiclient account. NOTE: If user switches they can initiate recording on the new user's phone conversation.

**Conferencing** - Set to true to allow user to start conference calls. Only used for the agent's web-client application.

**Admin Hangup** - Set to true to allow user to be able to hangup any line at will through astGUIclient. Good idea only to enable this for Admin users. Only used for the astguiclient web-client application.

**Admin Hijack** - Set to true to allow user to be able to grab and redirect to their extension any line at will through astGUIclient. Good idea only to enable this for Admin users. But is very useful for Managers. Only used for the astguiclient web-client application.

**Admin Monitor** - Set to true to allow user to be able to grab and redirect to their extension any line at will through astGUIclient. Good idea only to enable this for Admin users. But is very useful for Managers and as a training tool. Only used for the astguiclient web-client application.

**Call Park** - Set to true to allow user to be able to park calls on astGUIclient hold to be picked up by any other astGUIclient user on the system. Calls stay on hold for up to a half hour then hangup. Usually enabled for all. Only used for the astguiclient web-client application.

**Updater Check** - Set to true to display a popup warning that the updater time has not changed in 20 seconds. Useful for Admin users. NOT USED ANYMORE.

**AF Logging** - Set to true to log many actions of astGUIclient usage to a text file on the user's computer. NOT USED ANYMORE.

**Queue Enabled** - Set to true to have client applications use the Asterisk Central Queue system. Required for Dialer and recommended for all users. NOT USED ANYMORE.

**CallerID Popup** - Set to true to allow for numbers defined in the extensions.conf file to send CallerID pop-up screens to astGUIclient web-client users.

**VMail Button** - Set to true to display the VOICEMAIL button and the messages count display on astGUIclient web-client.

**Fast Refresh** - Set to true to enable a new rate of refresh of call information for the astGUIclient. Default disabled rate is 1000 ms ,1 second. Can increase system load if you lower this number. Only

used for the astguiclient web-client application.

**Fast Refresh Rate** - in milliseconds. Only used if Fast Refresh is enabled. Default disabled rate is 1000 ms ,1 second. Can increase system load if you lower this number. Only used for the agent's web-client application.

**Persistent MySQL** - If enabled the astGUIClient connection will remain connected instead of connecting every second. Useful if you have a fast refresh rate set. It will increase the number of connections on your MySQL machine. NOT USED ANYMORE.

**Auto Dial Next Number** - If enabled the Dialer client will dial the next number on the list automatically upon disposition of a call unless they selected to "Stop Dialing" on the disposition screen. NOT USED ANYMORE.

**Stop Rec after each call** - If enabled the Dialer client will stop whatever recording is going on after each call has been dispositioned. Useful if you are doing a lot of recording or you are using a web form to trigger recording.

**Enable SIPSAK Messages** - If enabled the server will send messages to the SIP phone to display on the phone LCD display when logged into Dialer . Feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

**Template ID** - This is the optional conf file template ID that this phone entry will use for its Asterisk settings. Default is --NONE-- or blank.

**Conf Override Settings** - If populated, and the Template ID is set to --NONE-- then the contents of this field are used as the conf file entries for this phone. generate\_Dialer\_conf for this phones server must be set to Y for this to work. This field should NOT contain the [extension] line, that will be automatically generated.

### ***Call-In phone entry, dial-in Dialer agents***

The Call-In feature allows agents to dial into the Dialer system instead of having the system call them when they log in. With this feature you only need one phones entry for all agents dialing in on a single server. Every agent would use the same phone login(callin) when they log in to the Dialer .php agent interface. When the agent dials in the phone number that your administrator has set up for call-in capability, the agent will need to enter their user ID and password. For agents that will be calling in to Dialer this way they will need to have Dialer user IDs and passwords that are only made up of digits, no letters or special characters.

### ***Phone Stats***

This report shows totals for this phone in channel, group, call count, and time; displayed for 1 or several days. This also shows individual records for the last 1000 calls placed in the date range indicated.

### ***Phone Call Recordings***

This links directly to the User Stats report for the agent using the phone during the time period queried.

This includes their call stats & recordings.

### ***Delete Phone***

If the option is enabled, a manager can go to the bottom of the phone modification page and click on the "DELETE THIS PHONE" link to remove a phone entry from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS PHONE" link to remove the phone from the system. This only works when you login to the Dialer admin pages using your Dialer USER account that has permissions to delete phone entries.



ALIAS ID	ALIAS NAME	PHONE LOGINS LIST	GROUP	MODIFY
a101	a101	100.101	---ALL---	<a href="#">MODIFY</a>

**Figure 26. Phone Alias**

## **ADMIN – PHONE ALIAS**

On multi-server systems where you are using SIP, IAX or Webphone phones that are able to register to multiple servers at the same time, you may want to use Phone Aliases. They allow you to balance the number of agents logged into each server across all servers in a cluster as the agents log in. If a server fails or changes to Active=N then the agents that were on that server can simply log out and back in using their phone alias login and they will be using another server.

NOTE: All phones that are put together in a Phone Alias should have the same Login Password.

Here is the listing of fields in the Phone Alias screen:

**Alias ID** - The ID of the alias used to allow for phone load balanced logins. no spaces or other special characters allowed. Must be between 2 and 20 characters in length. This is what the agent would use to log in as the “Phone Login” on their agent screen.

**Alias Name** - The name used to describe a phones alias, Must be between 2 and 50 characters in length.

**Phones Logins List** - The comma separated list of phone logins used when an agent logs in using phone load balanced logins. The Agent application will find the active server with the fewest agents logged into it and place a call from that server to the agent upon login.

At the bottom of this screen you will see the details on the phones that are set up in this Phone Alias with links to go to those phones entries.

GROUP ALIAS ID	GROUP ALIAS NAME	CID NUMBER	CID NAME	ACTIVE	ADMIN GROUP	MODIFY
ANNEX_OFFICE	Annex Office number	9995551213	Annex Office	N	---ALL---	<a href="#">MODIFY</a>
MAIN_OFFICE	Main Office number	9995551212	Main Office	N	---ALL---	<a href="#">MODIFY</a>

Figure 27. Group Alias

## GROUP ALIAS

Group Aliases are an optional feature that allows agents to select an outbound callerID to send manual calls out with. This feature also works for three-way calls.

**Group Alias ID** - The ID of the group alias used by agents to dial out calls from the Dialer agent interface with different Caller IDs. no spaces or other special characters allowed. Must be between 2 and 20 characters in length.

**Group Alias Name** - The name used to describe a group alias, Must be between 2 and 50 characters in length.

**Admin User Group** - This is the administrative user group for this Group Alias record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Group Alias record.

**Caller ID Number** - The Caller ID number used in this Group Alias. Must be digits only.

**Caller ID Name** - The Caller ID name that can be sent out with this Group Alias. As far as we know this will only work in Canada on PRI circuits and using an IAX loop trunk through Asterisk. In the USA as in most of the rest of the world there is a separate lookup process for getting the CIDname for a call, while in Canada this is not the case and the CIDname is sent along with the call as it is done with CIDnumber in the rest of the world.

ADMINISTRATION						
CALL TIME LISTINGS:						
CALLTIME ID	CALLTIME NAME	DEFAULT START	DEFAULT STOP	ADMIN GROUP	MODIFY	
12pm-5pm	default 12pm to 5pm calling	1200	1700	---ALL---	<a href="#">MODIFY</a>	
12pm-9pm	default 12pm to 9pm calling	1200	2100	---ALL---	<a href="#">MODIFY</a>	
24hours	default 24 hours calling	0	2400	---ALL---	<a href="#">MODIFY</a>	
5pm-9pm	default 5pm to 9pm calling	1700	2100	---ALL---	<a href="#">MODIFY</a>	
9am-5pm	default 9am to 5pm calling	900	1700	---ALL---	<a href="#">MODIFY</a>	
9am-9pm	default 9am to 9pm calling	900	2100	---ALL---	<a href="#">MODIFY</a>	

Figure 28. Call Times List

## ADMIN - Dialer CALL TIMES

Call Time definitions are the limits that you place on the days and times that you call customers, or in the case of In-Groups, the days and times that you will receive calls from customers. These are currently definable by day of the week, down to the hour and minutes. There is also a method for creating special rules to override these call time definitions by state, as well as Holiday options. These times are defined by local customer time, not by the time where your agents or your dialer are located, except in the case of In-Groups where the time defined is for the local server time.

When you click on the CALL TIMES link in the Admin section, you will enter the Call Times subsection. This starts with a full listing of every call time definition in the system with its call time ID, name, the default start and stop time, admin group, and a link to the call time modification page. We will first look at adding a new call time.

### Add a New Call Time Definition

You can get to the Add New Call Time screen by clicking on the "ADD NEW CALL TIME" link at the top of the CALL TIMES section. When adding a new call time you must make sure that you set both the "Call Time ID" and call time name or the submission will not be accepted. Also, please make sure that the call time ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a call time you will not be able to change that call time ID unless you delete the call time and re-create it again with a different call time ID. You cannot have duplicate call time IDs in the system, and call time IDs must be between 2 and 10 characters in length.

### Modify a Call Time Definition

*(screen shot of the Modify Call Time screen available in the Appendix)*

At the bottom of the Call Time modification page you will see a list of campaigns currently using that call time definition that you can click on to go to each campaign modification page.

**Call Time ID** - This is the short name of a Dialer Call Time Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field (it will support dashes). max 10 characters, minimum of 2 characters. This call time identifier has no direct relation to the rules that may be set within it. For example, just because a Call Time is named “24hours” does not mean that it is actually set to allow calls 24 hours a day.

**Call Time Name** - This is a more descriptive name of the Call Time Definition. This is a short summary of the Call Time definition. max 30 characters, minimum of 2 characters.

**Call Time Comments** - This is where you can place comments for a Dialer Call Time Definition such as "10am to 4pm with extra call state restrictions". max 255 characters.

**Admin User Group** - This is the administrative user group for this Call Time record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Call Time record.

**Default Start and Stop Times** - This is the default time that calling will be allowed to be started or stopped within this call time definition if the day-of-the-week start time is not defined. 0 is midnight. To prevent calling completely, set this field to 2400 and set the Default Stop time to 2400. To allow calling 24 hours a day, set the start time to 0 and the stop time to 2400. For inbound only, you can also set the stop call time higher than 2400 if you want the call time to go beyond midnight. So if you want your call time to run from 6 am until 2 am the next day, you would put 0600 as the start time and 2600 as the stop time.

**Weekday Start and Stop Times** - These are the custom times per day that can be set for the call time definition. Same rules apply as with the Default start and stop times.

**AH Override** – Audio files placed in this field will override the After Hours message for for any Ingroups assigned this Call Time. Default is empty.

**State Call Time Definitions** - This is the list of State specific call time definitions that are followed in this Call Time Definition. State Call Time Definitions, if selected in a call time definition, will override any call time settings for the state that is set in the state call time definition. To add an existing state call time definition to a call-time record, simply select the state record you want to add and click submit. It will then appear in the listing of state call time records being followed for this call time definition.

**State Call Time State** - This is the two letter code for the state that this calling time definition is for. For this to be in effect the local call time that is set in the campaign must have this state call time record in it as well as all of the leads having two letter state codes in them.

**Holiday Call Time Definitions** – This feature is designed to work with the inbound facet of Call Times. A holiday is created in the Add\_Holiday section for a period of hours, or a full day (in military time). The Holiday definition is then added to a Call time. Any In-groups or Call Menus that receive inbound calls, during the indicated holiday time, will be automatically routed to the After Hours option. Once the time period for the Holiday is over, the system reverts back to the normal call routing.

### ***State-specific Call Time Definitions***

The state-specific call time definitions are available from the CALL TIMES section by clicking on the "SHOW STATE CALL TIMES" link to display all of the state call times, or the "ADD NEW STATE CALL TIME" link to add new state specific call times. State-specific definitions function just like Call Time definitions except that they are restricted to one state(or province/territory) and multiple state-specific call times can be assigned to one or many call time definitions. State-specific call time definitions only work if you have the "state" field populated in the lists that you load into the dialer.

### ***Delete Call Times***

If the option is enabled, a manager can go to the bottom of the call time modification page and click on the "DELETE THIS CALL TIME DEFINITION" link to remove a call time from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS CALL TIME DEFINITION" link to remove the call time from the system.

ADMINISTRATION							
HOLIDAY LISTINGS:							
HOLIDAY ID	DATE	NAME	STATUS	START	STOP	ADMIN GROUP	MODIFY
new_year_2020	2020-01-01	News Year Day 2020	INACTIVE	900	2100	---ALL---	<a href="#">MODIFY</a>

**Figure 29. Call Time Holidays List**

## ADMIN - CALL TIME HOLIDAYS

Call Time Holidays allow you to be able to alter the hours of operation within a Call Time or State Call Time on one specific day.

The HOLIDAYS link is at the top of the page while in the CALL TIMES Admin section,. This starts with a full listing of every holiday call time definition in the system with its call time ID, name, the default start and stop time, admin group, and a link to the holiday modification page. We will first look at adding a new holiday.

### **Add a New Holiday Definition**

You can get to the Add New Holiday screen by clicking on the "ADD HOLIDAY" link at the top of the CALL TIMES section. When adding a new holiday you must make sure that you set both the "Holiday ID" and holiday name as well as the Holiday Date. or the submission will not be accepted. Also, please make sure that the Holiday ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a holiday you will not be able to change that Holiday ID unless you delete the holiday and re-create it again with a different Holiday ID. You cannot have duplicate holiday IDs in the system, and holiday IDs must be between 2 and 30 characters in length.

### **Modify a Holiday Definition**

*(screen shot of the Modify Holiday screen available in the Appendix)*

At the bottom of the Holiday modification page you will see a list of Call Times currently using that holiday definition that you can click on to go to each Call Time modification page.

**Holiday ID** -This is the short name of a Holiday Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 30 characters, minimum of 2 characters.

**Holiday Name** -This is a more descriptive name of the Holiday Definition. This is a short summary of the Holiday definition. max 100 characters, minimum of 2 characters.

**Holiday Comments** -This is where you can place comments for a Holiday Definition such as -10am to 4pm boxing day restrictions-. max 255 characters.

**Holiday Date** -This is the date of the holiday.

**Holiday Status** -This is the status of the holiday entry. ACTIVE status means that the holiday will be enabled on the holiday date. INACTIVE status means that the holiday will be ignored even on the holiday date. EXPIRED means that the holiday has passed its holiday date. Default is INACTIVE.

### ***Delete Holidays***

If the option is enabled, a manager can go to the bottom of the holiday modification page and click on the "DELETE THIS HOLIDAY DEFINITION" link to remove a holiday from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS HOLIDAY DEFINITION" link to remove the holiday from the system.

ADMINISTRATION		SHIFT LISTINGS:					
SHIFT ID	SHIFT NAME	SHIFT START	SHIFT LENGTH	WEEKDAYS	ADMIN GROUP	MODIFY	
24HRMIDNIGHT	24 hours 7 days a week	0000	24:00	0123456	---ALL---	<a href="#">MODIFY</a>	
M-F_9am5pm	Monday to Friday 9am to 5pm	0900	08:00	12345	---ALL---	<a href="#">MODIFY</a>	
Sat_10am4pm	Saturday 10am to 4pm	1000	06:00	6	---ALL---	<a href="#">MODIFY</a>	

**Figure 30. Shifts**

### Shifts

Shifts are used in some reports within Dialer and are also used to restrict User Groups to be able to log in to the Dialer agent interface.

**Shift ID** - This is the short name of a Dialer Shift Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

**Shift Name** - This is a more descriptive name of the Shift Definition. This is a short summary of the Shift definition. max 50 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this Shift record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Shift record.

**Shift Start Time** - This is the time that the campaign shift begins. Must only be numbers, 9:30 AM would be 0930 and 5:00 PM would be 1700.

**Shift End Time** - This is the time that the campaign shift ends. Must only be numbers, 9:30 AM would be 0930 and 5:00 PM would be 1700.

**Shift Length** - This is the time in Hours and Minutes that the campaign shift lasts. 8 hours would be 08:00 and 7 hours and 30 minutes would be 07:30.

**Shift Weekdays** - In this section you should choose the days of the week that this shift is active.

**Report Option** - This option allows this specific shift to show up in selected reports that support this option.

**Report Rank** - This option allows you to rank shifts in selected reports that support this option.



SERVER ID	NAME	SERVER IP	ACTIVE	AGENT	ASTERISK	TRUNKS	GMT	MODIFY
TESTast	Test install of Asterisk server	10.10.10.15	Y	Y	1.4.21.2	23	-5.00	<a href="#">MODIFY</a>
TESTast2	second test server	10.10.10.16	Y	Y	13.21.1-vici	23	-5.00	<a href="#">MODIFY</a>

Figure 31. Admin - Servers List

## ADMIN - SERVERS

If you click on the “Servers” link you will see the Servers list. This page will list the server ID, server name, server IP address, Asterisk version, active status and a link to modify the server information.

### Add a New Server

You can get to the Add Server screen by clicking on the "ADD A NEW SERVER" link on the left side menu bar of the admin page. The add a server screen has the 5 required fields that are needed to have a valid server record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new server you must make sure that you set the server ID, server name, server\_ip and Asterisk version or the submission will not be accepted. Also, please make sure that the server ID you have chosen does not have any spaces or punctuation, only letters or numbers.

### Modify Servers

*(screen shot of the Modify Server screen available in the Appendix)*

From the LIST ALL SERVERS screen you can click on the MODIFY link for any server entry to modify its record. At the bottom of the server modification page is a list of the phones, conferences and Dialer \_conferences that are listed in the system as belonging to that server, each with a link to go to its phone or conference modification page.

**Server ID** - This field is where you put the servers' name, it doesn't have to be an official domain sub, just a nickname to identify the server to Admin users within the system.

**Server Description** - The field where you use a small phrase to describe the server.

**Server IP Address** - The field where you put the Network IP address(IPv4) of the server.

**Active** - Set whether the server is active or inactive.

**System Load** - These two statistics show the loadavg of a system times 100 and the CPU usage percentage of the server and is updated every minute. The loadavg should, on average, be below 100 multiplied by the number of CPU cores your system has, for optimal performance. The CPU usage percentage should stay below 50 for optimal performance.

**Live Channels** - This field shows the current number of Asterisk channels that are live on the system right now. It is important to note that the number of Asterisk channels is usually much higher than the number of actual calls on a system. This field is updated once every minute. The Agents field shows the current number of agents logged into the agent screen on this server.

**Disk Usage** - This field will show the disk usage for every partition on this server. This field is updated once every minute.

**System Uptime** - This field will show the system uptime of this server. This field only updates if configured to do so by your administrator.

**Admin User Group** - This is the administrative user group for this Server record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Server record.

**Asterisk Version** - Set the version of Asterisk that you have installed on this server. Examples: '1.2', '1.0.8', '1.0.7', 'SVN', etc... This is used because versions 1.0.8, 1.0.9 and 13.X have a different method of dealing with Local/ channels than other versions do.

**Max Trunks** - This field will determine the maximum number of lines that the Dialer auto-dialer will attempt to call on this server. If you want to dedicate two full PRI T1s to Dialer on a server then you would set this to 46. Default is 96.

**Max Calls per Second** - This setting determines the maximum number of calls that can be placed by the outbound auto-dialing script on this server per second. Must be from 1 to 100. Default is 5. It is recommended that for most SIP providers you set this to 4 or lower. Some SIP carriers cannot handle more than 1.

**Balance Dialing** - Setting this field to Y will allow the server to place balance calls for campaigns in Dialer, between multiple dialers in a cluster, so that the defined dial level can be met even if there are no agents logged into that campaign on this server. Default is N. This is only used in multi-server Dialer setups.

**Balance Rank** - This field allows you to set the order in which this server is to be used for balance dialing, if balance dialing is enabled. The server with the highest rank will be used first in placing Balance fill calls. Default is 0.

**Balance Offlimits** - This setting defines the number of trunks to not allow Dialer balance dialing to use. For example if you have 40 max Dialer trunks and balance offlimits is set to 10 you will only be able to use 30 trunk lines for Dialer balance dialing. Default is 0. This is only used in multi-server Dialer setups.

**Telnet Host** - This is the address or name of the Asterisk server and is how the manager applications connect to it from where they are running. If they are running on the Asterisk server, then the default of 'localhost' is fine.

**Telnet Port** - This is the port of the Asterisk server Manager connection and is how the manager applications connect to it from where they are running. The default of '5038' is fine for a standard install.

**Manager User** - The username or login used to connect generically to the Asterisk server manager. Default is 'cron'

**Manager Secret** - The secret or password used to connect generically to the Asterisk server manager. Default is '1234'

**Manager Update User** - The username or login used to connect to the Asterisk server manager optimized for the Update scripts. Default is 'updatecron' and assumes the same secret as the generic user.

**Manager Listen User** - The username or login used to connect to the Asterisk server manager optimized for scripts that only listen for output. Default is 'listencron' and assumes the same secret as the generic user.

**Manager Send User** - The username or login used to connect to the Asterisk server manager optimized for scripts that only send Actions to the manager. Default is 'sendcron' and assumes the same secret as the generic user.

**Conf File Secret** - This is the secret, or password, for the server in the IAX auto-generated conf file for this server on other servers. Limit is 20 characters alphanumeric dash and underscore accepted. Default is test.

**Local GMT offset** - The difference in hours from GMT time NOT ADJUSTED FOR DAYLIGHT SAVING TIME of the server. Default is '-5'(Eastern USA Time zone)

**VMail Dump Exten** - The extension prefix used on this server to send calls directly through AGC to a specific voicemail box. Default is '85026666666666'.

**VMAIL Dump Exten NI** - This is the dial plan prefix used to send calls directly to a user voicemail from a live call in the astGUIclient app. This is the No Instructions setting.

**auto dial extension** - The default extension if none is present in the campaign to send calls to for Dialer auto dialing. Default is '8365'

**Default Context** - The default dialplan context used for scripts that operate for this server. Default is

'default'

**Conferencing Engine** - The conferencing engine used by Asterisk for agent sessions. Default is MEETME. CONFBRIDGE is only supported by patched Asterisk 16 and higher servers.

**Conf Update Interval** - The interval of the conferences updating process. Default is 60 seconds.

**System Performance** - Setting this option to Y will enable logging of system performance stats for the server machine including system load, system processes and Asterisk channels in use. Default is N. This field must be enabled if you want to be able to view the graphs on the server performance report.

**Server Logs** - Setting this option to Y will enable logging of all Dialer related scripts to their text log files. Setting this to N will stop writing logs to files for these processes, also the screen logging of asterisk will be disabled if this is set to N when Asterisk is started. Default is Y. To optimize system performance, you may want to disable server logs. It will reduce on hard drive usage and save drive space. We do recommend leaving this enabled when you first start running your system so that you can use the logs to debug problems if necessary.

**AGI Output** - Setting this option to NONE will disable output from all Dialer related AGI scripts. Setting this to STDERR will send the AGI output to the Asterisk CLI. Setting this to FILE will send the output to a file in the logs directory. Setting this to BOTH will send output to both the Asterisk CLI and a log file. Default is FILE. To optimize system performance, you may want to disable AGI output. It will reduce on hard drive usage and save drive space. We do recommend leaving this enabled when you first start running your system so that you can use the AGI output logs to debug problems if necessary.

**Carrier Logging Active** - This setting allows you to log all hangup return codes for any outbound list dialing calls that you are placing. Default is N.

**Gather Asterisk Output** - This setting allows you to activate a process that can run every 5 minutes on an active asterisk server and log the SIP/IAX peers and registry output along with the last 1000 lines of Asterisk CLI output. This output is then available to be displayed in the Asterisk Output Report on the Admin Utilities page. Default is N for inactive.

**Conf Qualify** - This setting allows you to add or remove the qualify entries in the Asterisk conf files. Default is Y for active.

**Recording Web Link** - This setting allows you to override the default of the display of the recording link in the administration web pages. Default is SERVER\_IP.

**Alternate Recording Server IP** - This setting is where you can put a server IP or other machine name that can be used in place of the server\_ip in the links to recordings within the administration web pages. Default is empty.

**External Server IP** - This setting is where you can put a server IP or other machine name that can be used in place of the server\_ip when using a webphone in the agent interface. For this to work you also must have the phones entry set to use the External Server IP. Default is empty.

**Web Socket URL** - For systems running Asterisk 11 and higher, this is the URL that a WebRTC phone needs to connect to the server.

**External Web Socket URL** - For systems running Asterisk 11 and higher, this is the External URL that a WebRTC phone needs to connect to the server. This External web socket is used if the Phone entry has Use External Server IP set to Y. Default is blank, which will use the normal Web Socket URL.

**Active Twin Server IP** - Some dialer systems require setting up dialer servers in pairs. This setting is where you can put the server IP of another dialer server that this server is twinned with. Server twinning is required for Orex integration. (See the Orex integration section of this manual) Default is empty for disabled.

**Active Asterisk Server** - If Asterisk is not running on this server, or if Dialer should not be using this server, or if are only using this server for other scripts like the hopper loading script you would want to set this to N. Default is Y.

**Auto-Restart Asterisk** -If Asterisk is running on this server and you want the system to make sure that it will be restarted in the event that it crashes, you might want to consider enabling this setting. If enabled, the system will check every minute to see if Asterisk is running, and if it is not it will attempt to restart it. This process will not run in the first 5 minutes after a system has been up. Default is N.

**Temp No-Restart Asterisk** -If Auto-Restart Asterisk is enabled on this server, turning on this setting will prevent the auto-restart process from running until after the server is rebooted. Default is N.

**Asterisk Restart URL** - If populated, this option will send a URL request for this URL every time that the Asterisk process is auto-restarted on this server. Default is blank for disabled.

**Active Agent Server** - Setting this option to N will prevent agents from being able to login to this server through the Dialer agent screen. This is very useful when using a phone login load balanced setup. Default is Y.

**Generate conf files** - If you would like the system to auto-generate asterisk conf files based upon the phones entries, carrier entries and load balancing setup within Dialer then set this to Y. Default is Y.

**Rebuild conf files** - If you want to force a rebuilding of the Asterisk conf files, or if any of the phones or carrier entries have changed then this should be set to Y. After the conf files have been generated and Asterisk has been reloaded then this will be changed to N. Default is Y.

**Rebuild Music On Hold** - If you want to force a rebuilding of the music on hold files or if the music on hold entries or server entries have changed then this should be set to Y. After the music on hold files have been synchronized and reloaded then this will be changed to N. Default is Y.

**Sounds Update** - If you want to force a check of the sound files on this server, and the central audio store is enabled as a system setting, then this field will allow the sounds updater to run at the next top of the minute. Any time an audio file is uploaded from the web interface this is automatically set to Y for all servers that have Asterisk active. Default is N.

**Recording Limit** - This field is where you set the maximum number of minutes that a call recording initiated by Dialer can be. Default is 60 minutes. This setting also limits the amount of time a 3-way call that has been left by an agent will stay up before it is terminated.

**Custom Dialplan Entry** - This field allows you to enter in any dialplan elements that you want for the server, the lines will be added to the default context.

### ***Dialer Server Trunks***

Dialer Server Trunks allows you to restrict the outgoing lines that are used on this server for campaign dialing on a per-campaign basis. You have the option to reserve a specific number of lines to be used by only one campaign as well as allowing that campaign to run over its reserved lines into whatever lines remain open, as long as the total lines used by Dialer on this server is less than the Max Dialer Trunks setting. Not having any of these records will allow the campaign that dials the line first to have as many lines as it can get under the Max Dialer Trunks setting.

### ***Conf File Templates***

Templates can be optionally used in phones entries and server carriers entries to keep the same set of parameters (such as allow=gsm to allow the GSM codec to be used) across multiple entries.

**Template ID** - This field needs to be at least 2 characters in length and no more than 15 characters in length, no spaces. This is the ID that will be used to identify the conf template throughout the system.

**Template Name** - This is the descriptive name of the conf file template entry.

**Admin User Group** - This is the administrative user group for this Template record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Template record.

**Template Contents** - This field is where you can enter in the specific settings to be used by all phones and-or carriers that are set to use this conf template. Fields that should NOT be included in this box are: secret, accountcode, account, username and mailbox.

Carrier ID	Carrier Name	Server IP	Protocol	Registration	Active	ADMIN GROUP	MODIFY
IAXEXAMPLE	TEST IAX carrier example	10.10.10.15	IAX2	register => te...	N	--ALL--	<a href="#">MODIFY</a>
PARAXIP	TEST ParaXip CPD example	10.10.10.15	SIP		N	--ALL--	<a href="#">MODIFY</a>
SIPEXAMPLE	TEST SIP carrier example	10.10.10.15	SIP	register => te...	N	--ALL--	<a href="#">MODIFY</a>

**Figure 32. Server Carriers**

### **Server Carriers(Trunks)**

Server Carrier trunks are how your Dialer server connects to the phone network or other Asterisk or VOIP(SIP) servers.

**Carrier ID** - This field needs to be at least 2 characters in length and no more than 15 characters in length, no spaces. This is the ID that will be used to identify the carrier for this specific entry throughout the system.

**Carrier Name** - This is the descriptive name of the carrier entry.

**Carrier Description** - This is put in the comments of the asterisk conf files above the dialplan and account entries. Maximum 255 characters.

**Admin User Group** - This is the administrative user group for this Carrier record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Carrier record.

**Registration String** - This field is where you can enter in the exact string needed in the IAX or SIP, PJSIP configuration file to register to the provider. Optional but highly recommended if your carrier allows registration. For more information on PJSIP, and example configurations, see the PJSIP\_SUPPORT.txt doc.

**Template ID** - This optional field allows you to choose a conf file template for this carrier entry.

**Account Entry** - This field is used if you have not selected a template to use, and it is where you can enter in the specific account settings to be used for this carrier. If you will be taking in inbound calls

from this carrier trunk you might want to set the context=trunkinbound within this field so that you can use the DID handling process within Dialer .

**Protocol** - This field allows you to define the protocol to use for the carrier entry. Currently only IAX and SIP, PJSIP are supported.

**Global String** - This optional field allows you to define a global variable to use for the carrier in the dialplan.

**Dialplan Entry** - This optional field allows you to define a set of dialplan entries to use for this carrier.

**Server IP** - This is the server that this specific carrier record is associated with. If you set this to 0.0.0.0 then this carrier entry will be put on all active asterisk servers.

**Active** - This defines whether the carrier will be included in the auto-generated conf files or not. If set to N, the carrier entry will not work.



ADMINISTRATION	CONFERENCE LISTINGS:			
	CONFERENCE	SERVER IP	EXTENSION	MODIFY
Reports	8800001	192.168.198.4		<a href="#">MODIFY</a>
Users	8800001	192.168.198.5		<a href="#">MODIFY</a>
Campaigns	8800001	192.168.198.7		<a href="#">MODIFY</a>
Lists	8800001	192.168.198.3		<a href="#">MODIFY</a>
Quality Control	8800001	192.168.198.6		<a href="#">MODIFY</a>
Scripts	8800002	192.168.198.6		<a href="#">MODIFY</a>
Filters	8800002	192.168.198.3		<a href="#">MODIFY</a>
Inbound	8800002	192.168.198.5		<a href="#">MODIFY</a>
User Groups	8800002	192.168.198.4		<a href="#">MODIFY</a>
Remote Agents	8800002	192.168.198.7		<a href="#">MODIFY</a>
Admin	8800003	192.168.198.6		<a href="#">MODIFY</a>
Call Times	8800003	192.168.198.3		<a href="#">MODIFY</a>
Shifts	8800003	192.168.198.5		<a href="#">MODIFY</a>
Phones	8800003	192.168.198.7		<a href="#">MODIFY</a>
Templates	8800003	192.168.198.4		<a href="#">MODIFY</a>
Carriers	8800004	192.168.198.6		<a href="#">MODIFY</a>
Servers	8800004	192.168.198.5		<a href="#">MODIFY</a>
Conferences	8800004	192.168.198.3		<a href="#">MODIFY</a>
System Settings	8800004	192.168.198.4		<a href="#">MODIFY</a>
	8800005	192.168.198.7		<a href="#">MODIFY</a>
	8800005	192.168.198.5		<a href="#">MODIFY</a>
	8800005	192.168.198.6		<a href="#">MODIFY</a>
	8800005	192.168.198.7		<a href="#">MODIFY</a>
	8800005	192.168.198.4		<a href="#">MODIFY</a>
	8800005	192.168.198.3		<a href="#">MODIFY</a>
	8800006	192.168.198.4		<a href="#">MODIFY</a>
	8800006	192.168.198.5		<a href="#">MODIFY</a>
	8800006	192.168.198.6		<a href="#">MODIFY</a>
	8800006	192.168.198.3		<a href="#">MODIFY</a>
	8800006	192.168.198.7		<a href="#">MODIFY</a>
	8800007	192.168.198.3		<a href="#">MODIFY</a>
	8800007	192.168.198.7		<a href="#">MODIFY</a>
	8800007	192.168.198.5		<a href="#">MODIFY</a>

Figure 33. ADMIN - Conferences List

## ADMIN - CONFERENCES and AGENT CONFERENCES

Because the Conferences and Agent Conferences sections are almost identical in function this section will cover both of them. If you click on the “Conferences” link you will see the Conferences list. This page will list the server IP address, Conference number and a link to modify the Conference information. In most cases you will only need to set up conferences once, or if your System Administrator has done this then you will never have to use this section. Conferences are only used by the AstGUIclient application(by default there are 50 of these per server) and the Agent Conferences are used by the Dialer agent screen(by default there are 250 of these per server).

You may also see “ConfBridge” options at the top of this page. If you do, that means your system administrator has enabled ConfBridge features on this system. ConfBridge is a newer conferencing technology that offers some additional features compared to the default agent session conferencing engine that has been used in Dialer for years. If you would like to learn more about ConfBridge, read the “ConfBridge Documentation.txt” document.

### Add a New Conference

You can get to the Add Conference screen by clicking on the "ADD A NEW CONFERENCE" link on the left side menu bar of the admin page. All that needs to be added is the server IP address and a conference number.

### Modify Conferences

(screen shot of Modify Conferences screen available in the Appendix)  
 From the SHOW ALL CONFERENCES screen you can click on the MODIFY link for any conference entry to modify it's record.

**Conference Number** - This field is where you put the meetme conference dialplan number. It is also recommended that the meetme number in meetme.conf matches this number for each entry. This is for the conferences in astGUIclient and is used for leave-3way-call functionality in Dialer .

**Server IP** - The menu where you select the Asterisk server that this conference will be on.

**Current Extension** - The phone that has reserved this conference(only filled-in if active).

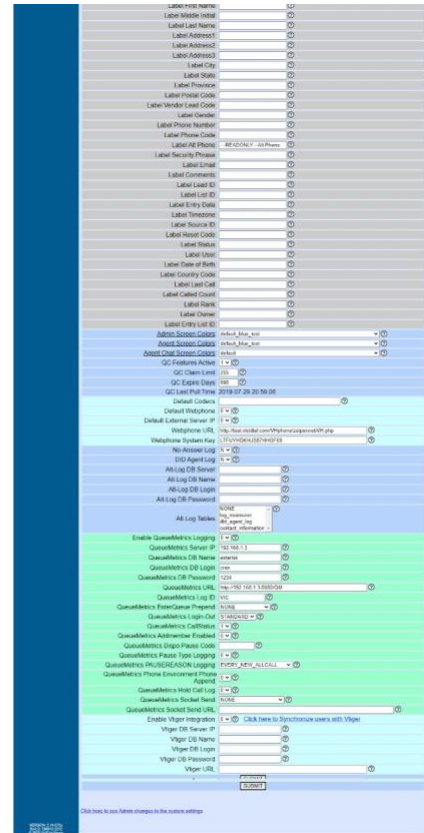
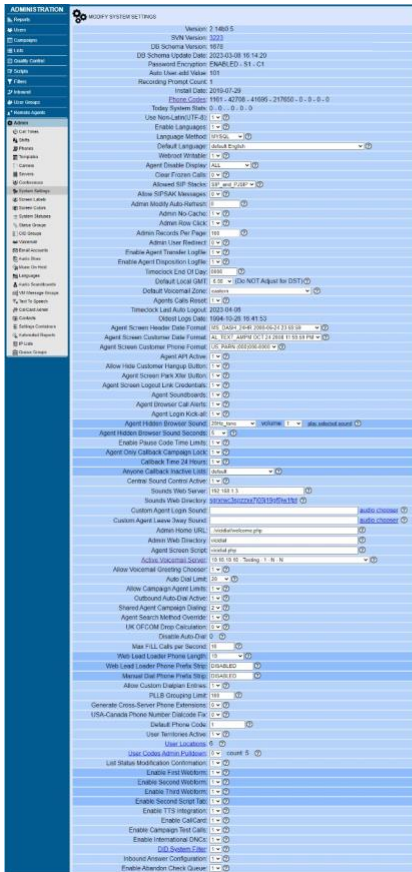


Figure 34. System Settings

## ADMIN - SYSTEM SETTINGS

This section contains global settings that effect every Dialer server on a system as well as every agent and campaign.

**Version** – This is the installed base version of Dialer . This is a database field only.

**SVN Version** – This links to a page showing Server version installation Information for each server in the Dialer cluster. This also displays the server's name, local IP address, load, number of channels, disk space usage, time & date, and whether the server is currently active.

**DB Schema Version** – The version of the database schema your Dialer system is using.

**DB Schema Update Date** – The date and time the DB schema was last updated.

**Password Encryption** - Prevents the user's password from being displayed in the admin interface or being stored in plain text in the database. The password must be re-entered any time it is changed. This feature is not enabled in the dialer by default.

If enabled, all user passwords must be converted to encrypted passwords. To use this your Administrator need to have this CPAN module installed on your web servers:

```
cpan> install Crypt::Eksblowfish::Bcrypt
```

To enable, first go to the Admin -> System Settings page and manually confirm that Password Encryption is DISABLED (fifth item from the top). Then, just run the following Linux CLI script: (run in test mode first!)

```
/usr/share/astguiclient/ADMIN_bcrypt_convert.pl --debugX --test
```

For more information on Encrypted Passwords, read the ENCRYPTED\_PASSWORDS.txt document in the docs directory ([http://dialer.org/docs/ENCRYPTED\\_PASSWORDS.txt](http://dialer.org/docs/ENCRYPTED_PASSWORDS.txt))

**Auto User-Add Value** – The Dialer user ID value that will be next if you use the AUTO-GENERATE option when creating the user

**Recording Prompt Count** – This is a database field that will display the current value of the highest recording prompt ID. This is for audio prompts recorded through the local 8168 extension.

**Install Date** – The original date this Dialer system was installed.

**Phone Codes** – Each set of digits, separated by the dash “-”, represent phone code totals in Dialer . The 1<sup>st</sup> set of digits are the total country codes (includes unique country code, timezone, & area code combinations). The 2<sup>nd</sup> set are the United States ZIP codes (includes ZIP code, area code, state prefix, & time zone). The possible 3<sup>rd</sup> set is a proprietary list that can be purchase additionally from Dialer .org, it contains up-to-date (updated annually) NPA-NXX information and is 0.6% more accurate than using just the default area code(on an average dataset). Clicking on the [Phone Codes](#) link will take you to a set of pages that will list out all of the records in the Phone Codes, Postal Codes and Timezones database tables.

**Today System Stats** – Simply indicates active back-end processing on the dialer for the day. This should never indicate all zeroes except on a newly-installed or unused system.

**Use Non-Latin** - This option allows you to default the web display script to use UTF8 characters and not do any latin-character-family regular expression filtering or display formatting. Default is 0. If this option is enabled, many security features that filter input for data and settings fields will be disabled. It is not recommended that you enable this feature unless your webserver is not connected to the Internet.

**Enable Languages** -This setting allows you to enable non-English language translations on the system. A new section called Languages under the Admin section will also be available to manager Languages. Default is 0 for disabled.

**Language Method** -This setting defines how the language translation works when pages are loaded. The MYSQL method performs a database query for every display of a phrase in the interface. The DISABLED method will always display -default English- no matter what other settings are set to. Default is DISABLED. To use alternate languages, this must be set to MYSQL.

**Default Language** -This is the language that the agent and administrative interface will default to before the agent logs in. Default is -default English-.

**Webroot Writable** - This setting allows you to define whether temp files, debug files and authentication files should be placed in the webroot on your web server. Default is 1.

**Agent Disable Display** - This field is used to select when to show an agent when their session has been disabled by the system, a manager action or by an external measure. The NOT\_ACTIVE setting will disable the message on the agents screen. The LIVE\_AGENT setting will only display the disabled message when the agents Dialer \_auto\_calls record has been removed, such as during a force logout or emergency logout. The Default is ALL.

**Clear Frozen Calls** -This option can enable the ability for the general Reports page and the optional AST\_timecheck.pl script to clear out the auto\_calls entries for a frozen server so they do not affect call routing. Default is 0 for disabled.

**Allowed SIP Stacks** - This option will determine which SIP modules in Asterisk will be allowed to be configured on your dialers for Phones and Carriers. The standard up until Asterisk 16 is -SIP- which uses the older chan\_sip module. The newer PJSIP can be used with Asterisk 16 and higher, if configured properly. Default is SIP.

**Allow SIPSAK Messages** - If set to 1, this will allow the phones table setting to work properly, the server will send messages to the SIP phone to display on the phone LCD display when logged into Dialer . This feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

**Admin Modify Auto-Refresh** - This is the refresh interval in seconds of the modify screens in this admin interface. Setting this to 0 will disable it, setting it below 5 will mostly make the modify screens unusable because they will refresh too quickly to change fields. This option is useful in situations where more than one manager is controlling settings on an active campaign or in-group so that the settings are refreshed frequently. Default is 0.

**Admin No-Cache** - Setting this to 1 will set all admin pages to web browser no-cache, so every screen has to be reloaded every time it is viewed, even if clicking back on the browser. Default is 0 for disabled.

**Admin Row Click** - Setting this to 1 will allow you to click on a row to go to a record link in addition to being able to go to the record link by clicking on the text link. Default is 1 for enabled.

**Admin Records Per Page** - This setting will allow you to set the maximum number of records that can appear on an admin page listing. Currently only works for Phones and DID's. Default is 0 for disabled.

**Admin User Redirect** - If enabled, you can define a URL that an admin web user is redirected to when they log in to the admin screens. This is often used for level 7 report only users to be sent to a single report without seeing the admin screens at all. Default is 0 for disabled.

**Enable Agent Transfer Logfile** - This option will log to a text logfile on the webserver every time a call is transferred to an agent. Default is 0, disabled.

**Enable Agent Disposition Logfile** - This option will log to a text logfile on the webserver every time a call is dispositioned by an agent. Default is 0, disabled.

**Timeclock End Of Day** - This setting defines when all users are to be auto logged out of the timeclock

system. This is also the time of day when the daily counts for per-user/per-ingroup/per-campaign call counters will be reset to 0. Only runs once a day. must be only 4 digits 2 digit hour and 2 digit minutes in 24 hour time. Default is 0000, which is midnight local server time.

**Default Local GMT** - This setting defines what will be used by default when new phones and servers are added using this admin web interface. **THIS SETTING SHOULD NEVER BE ADJUSTED FOR DAYLIGHT-SAVING-TIME.** Default is -5.

**Default Voicemail Zone** - This setting defines what zone will be used by default when new phones and voicemail boxes are created. The list of available zones is directly taken from the voicemail.conf file. Default is eastern.

**Agents Calls Reset** - Defines whether the logged-in agents and active phone calls records are to be reset at the timeclock end of day. If your system is running 24/7, you should set this to 0. Default is 1 for enabled.

**Timeclock Last Auto Logout** - This read-only field displays the date of the last auto-logout.

**Oldest Logs Date** – This is a display only field that will show the oldest non-archived log date. It is recommended that on busy systems, your Administrator set up archiving of your older call and activity logs in order to keep the database running efficiently. You can still access the archived data through an “archive logs” option in most of the reports in the system.

**Agent Screen Header Date Format** - This menu allows you to choose the format of the date that shows up at the top of the Dialer agent screen. The options for this setting are: default is **MS\_DASH\_24HR.**

- MS\_DASH\_24HR 2008-06-24 23:59:59 - Default date format with year month day followed by 24 hour time
- US\_SLASH\_24HR 06/24/2008 23:59:59 - USA date format with month day year followed by 24 hour time
- EU\_SLASH\_24HR 24/06/2008 23:59:59 - European date format with day month year followed by 24 hour time
- AL\_TEXT\_24HR JUN 24 23:59:59 - Text date format with abbreviated month day followed by 24 hour time
- MS\_DASH\_AMPM 2008-06-24 11:59:59 PM - Default date format with year month day followed by 12 hour time
- US\_SLASH\_AMPM 06/24/2008 11:59:59 PM - USA date format with month day year followed by 12 hour time
- EU\_SLASH\_AMPM 24/06/2008 11:59:59 PM - European date format with day month year followed by 12 hour time
- AL\_TEXT\_AMPM JUN 24 11:59:59 PM - Text date format with abbreviated month day followed by 12 hour time

**Agent Screen Customer Date Format** - This menu allows you to choose the format of the customer time zone date that shows up at the top of the Customer Information section of the Dialer agent screen. The options for this setting are: default is **AL\_TEXT\_AMPM**

- MS\_DASH\_24HR 2008-06-24 23:59:59 - Default date format with year month day followed by 24 hour time
- US\_SLASH\_24HR 06/24/2008 23:59:59 - USA date format with month day year followed by 24 hour time
- EU\_SLASH\_24HR 24/06/2008 23:59:59 - European date format with day month year followed by 24 hour time
- AL\_TEXT\_24HR JUN 24 23:59:59 - Text date format with abbreviated month day followed by 24 hour time
- MS\_DASH\_AMPM 2008-06-24 11:59:59 PM - Default date format with year month day followed by 12 hour time
- US\_SLASH\_AMPM 06/24/2008 11:59:59 PM - USA date format with month day year followed by 12 hour time
- EU\_SLASH\_AMPM 24/06/2008 11:59:59 PM - European date format with day month year followed by 12 hour time
- AL\_TEXT\_AMPM JUN 24 11:59:59 PM - Text date format with abbreviated month day followed by 12 hour time

**Agent Screen Customer Phone Format** - This menu allows you to choose the format of the customer phone number that shows up in the status section of the Dialer agent screen. The options for this setting are: default is **US\_PARN**

- US\_DASH 000-000-0000 - USA dash separated phone number

- US\_PARN (000)000-0000 - USA dash separated number with area code in parenthesis
- MS\_NODS 0000000000 - No formatting
- UK\_DASH 00 0000-0000 - UK dash separated phone number with space after city code
- AU\_SPAC 000 000 000 - Australia space separated phone number
- IT\_DASH 0000-000-000 - Italy dash separated phone number
- FR\_SPAC 00 00 00 00 00 - France space separated phone number

**Agent API Active** - If set to 1, this will allow the Agent API and Non-Agent API interfaces to function. Default is 0.

**Allow Hide Customer Hangup Button** - This setting will allow the campaign setting to be able to hide the agent screen Hangup Customer button, and the Transfer Conference frame Hangup Both button, for agents logging in to that campaign. This option should only be used if the campaign is using a custom application to hang up customer phone calls through the Agent API. Default is 0 for disabled.

**Agent Screen Park Xfer Button** - This option defines whether the agent screen will have a button in the Transfer Conference frame that will allow the agent to park a 3way call. Default is 0 for disabled.

**Agent Screen Logout Link Credentials** - This option controls whether the agent screen logout link will contain the agent credentials as a part of the link, or if the link will go to a blank login page. -0- will go to a blank form and -1- will go to a form that has the user credentials filled in.

**Agent Soundboards** - This option allows you to create agent audio soundboards that allow an agent in the user screen to click on audio file buttons to have them play in their session with the customer. Default is 0 for disabled.

**Agent Browser Call Alerts** - This option, if enabled, will allow you to select a sound, at the campaign level, when a call arrives in an agent session, to be played by the web browser program that the agent is using to log into the Agent Screen with. This is only recommended for agents using softphones or webphones. If you decide to use this option, you may want to contact your system administrator to disable the default enter and leave session sounds on your dialers. Default is 0 for disabled.

**Agent Login Kick-all** - If enabled, when an agent logs into the agent screen, any channels that were already in the agent session will be hung up before the agent is placed into the session. This will delay the agent login by a couple of seconds. Default is 0 for disabled.

**Agent Hidden Browser Sound** - This feature will allow you to have the selected sound file played to the Agent Screen when the web browser window with the Agent Screen in it is hidden or the agent changes to a different application on their computer. To enable this feature, the Agent Hidden Browser Sound Seconds below must be greater than 0. This feature can be used to disable web browser javascript throttling if set to an audible sound at a 20 second interval. We have tested this with the -click\_quiet- sound file at a volume of -25-.

**Agent Hidden Browser Sound Seconds** - This is the interval at which the selected Agent Hidden Browser Sound above will be played. If this is set to 20, then the Agent Hidden Browser Sound will be played every 20 seconds that the agent screen is hidden from view. Default is 0 for disabled.

**Enable Pause Code Time Limits** - This option allows you to be able to set the Time Limit field in campaign pause codes, which will change the color of the agent on the Real-Time Report if they are in

that pause code for more than the defined amount of seconds. Default is 0 for disabled.

**Agent Only Callback Campaign Lock** - This option defines whether AGENTONLY callbacks are locked to the campaign that the agent originally created them under. Setting this to 1 means that the agent can only dial them from the campaign they were set under, 0 means that the agent can access them no matter what campaign they are logged into. Default is 1.

**Callback Time 24 Hours** -This option defines whether the agent sees 12 hour time with AM PM options or 24 hour time on the Callback setting screen in the agent interface. Default is 0 for disabled.

**Anyone Callback Inactive Lists** - This option defines whether an ANYONE callback within an inactive list will be placed in the hopper to be dialed or not. The default option will place ANYONE scheduled callbacks from inactive lists into the hopper for up to one minute before removing them from the hopper. Using the NO\_ADD\_TO\_HOPPER option will prevent ANYONE scheduled callbacks from inactive lists from ever being put into the hopper while the list is inactive. The KEEP\_IN\_HOPPER option will put ANYONE scheduled callbacks from inactive lists into the hopper and will make sure they stay in the hopper until they are dialed, or they are no longer dialable due to a Call Time setting. This feature only affects campaigns that use the dial hopper. Default is default.

**Central Sound Control Active** - This option defines whether the sound synchronization system is active across all servers. Default is 0 for inactive.

**Sounds Web Server** - This is the server name or IP address of the web server that will be handling the sound files on this system, this must match the server name or IP of the machine you are trying to access the audio\_store.php webpage on or it will not work. Default is 127.0.0.1. If you need to have your webservers operate on SSL only, then prefix this with https://

**Sounds Web Directory** - This auto-generated directory name is created at random by the system as the place that the audio store will be kept. All audio files will reside in this directory.

**Custom Agent Login Sound** -This is a system-wide feature that only works on Asterisk 1.8 servers or higher. This allows you to set an audio file for your agents to hear after their phone has connected to the server after they have logged in to the agent screen. If you want to have this audio prompt be the only prompt that the agent hears, then you will need to copy the sip-silence audio files over the only-person audio files. If you want the agent to hear no prompt when they login then also set this field to sip-silence. Default is EMPTY.

**Custom Agent Leave 3way Sound** -This is a system-wide feature that only works on Asterisk 1.8 servers or higher. This allows you to set an audio file for your agents to hear after they have left a 3way conference in the agent screen. If you want to have this audio prompt be the only prompt that the agent hears, then you will need to copy the sip-silence audio files over the only-person audio files. If you want the agent to hear no prompt after they leave a 3way call then also set this field to sip-silence. Default is EMPTY.

**Admin Home URL** - This is the URL or web site address that you will go to if you click on the HOME link at the top of the admin.php page.

**Admin Web Directory** - This is the directory where administration web content, like admin.php,



reside. Default is dialer . To figure out your Admin web directory; it would be everything between the domain name and the admin.php in the URL on this page (without the beginning and ending slashes).

**Agent Screen Script** -This is the PHP script page of the agent screen.

**Active Voicemail Server** - In multi-server systems, this is the server that will handle all voicemail boxes. This server is also where the dial-in generated prompts will be uploaded from, the 8168 recordings. Another function of this server is to clear the daily call counts at the Timeclock End of Day, so it is important that this server is not down or being rebooted at that time. It is important that this server is both Active and an Active Asterisk server.

**Allow Voicemail Greeting Chooser** - If enabled, this will allow you to choose an audio file from the audio store to be played as the voicemail greeting to a specific voicemail box. Default is 0 for disabled.

**Auto Dial Limit** - This is the maximum limit of the auto dial level in the campaign screen.

**Outbound Auto-Dial Active** - This option allows you to enable or disable outbound auto-dialing within Dialer , setting this field to 0 will remove the LISTS and FILTERS sections and many fields from the Campaign Modification screens. Manual entry dialing will still be allowable from within the agent screen, but no list dialing will be possible. Default is 1 for active.

**Shared Agent Campaign Dialing** - This option will allow you to set SHARED campaign Dial Methods in order to share agents across multiple outbound campaigns. For more details on how to set this up properly, read the AGENT\_MULTI-CAMPAIGN\_DIALING.txt document. Default is 0 for disabled. [http://dialer.org/docs/AGENT\\_MULTI-CAMPAIGN\\_DIALING.txt](http://dialer.org/docs/AGENT_MULTI-CAMPAIGN_DIALING.txt)

**Agent Search Method Override** - This option will allow you to override the agent search method that is defined in the dialplan on your dialers on a per in-group and-or per campaign basis. Setting this to -1- will enable the override for both in-groups and campaigns. -2- will enable only for in-groups. -3- will enable only for campaigns. Default is 0 for disabled. WARNING, we do not recommend enabling this setting, it can lead to greatly increased dropped calls if improperly used.

**UK OFCOM Drop Calculation** -This option allows you to enable the new UK OFCOM Drop calculation formula for individual campaigns. As of December 2015, OFCOM in the UK changed their method for calculating the drop,or abandon, percentage for an outbound dialing campaign. The new formula includes an estimate of the number of drops that were answering machines. They do this by using the agent-answered percentage of answering machines and subtracting that percentage from the number of drops. Then that new drop number is divided by the total agent-answered human-answered calls PLUS the number of drops. This differs in several ways from the way it had been done, as well as the way the drop percentage has been calculated in the USA and Canada. This new UK drop calculation method can be activated as a system setting AND a campaign option. Both must be enabled for the campaign to use the new method. In order for agent-stated answering machines to be calculated properly, we have added an answering machine status flag that is used to gather those statuses. Default is 0 for inactive.

**Disable Auto-Dial** - This can only be edited by a system administrator. It will not remove any options from the management web interface, but it prevents any auto-dialing of leads. Only Manual Dial outbound calls triggered directly by agents will function if this is enabled. Default is 0 for inactive.

**Allow Campaign Agent Limits** - If enabled, this setting will allow you to set the maximum number of agents that can be logged in to a single campaign at one time, defined at the campaign level. Default is 0 for disabled.

**Max FILL Calls per Second** - This setting determines the maximum number of calls that can be placed by the auto-FILL outbound auto-dialing script on for all servers, per second. Must be from 1 to 200. Default is 40.

**Web Lead Loader Phone Length** -This setting allows you to only allow phone numbers of a specific length into the system when loading leads with the web lead loader. The CHOOSE option allows a manager to optionally select a number of phone number digits to check the length by when loading leads one file at a time. Selecting a number option will not allow a manager to choose while loading leads, the check will be used every time the web lead loader is used. Default is DISABLED.

**Web Lead Loader Phone Prefix Strip** - If not DISABLED, this setting will strip the entered characters from the beginning of the phone number of a lead when it is loaded into the system by the web lead loader. For example, if this field is set to 0 and the phone number in a lead file is 0123456789, then the phone number would be imported into the system as 123456789. Default is DISABLED.

**Manual Dial Phone Prefix Strip** - If not DISABLED, this setting will strip the entered characters from the beginning of the phone number of a lead when it is manual dialed by the agent in the agent screen. For example, if this field is set to 0 and the phone number the agent enters to manual dial is 0123456789, then the phone number would be changed to 123456789 before it is dialed and entered into the system. Default is DISABLED.

**Allow Custom Dialplan Entries** - This option allows you to enter custom dialplan lines into Call Menus. Default is 0 for inactive.

**PLLB Grouping Limit** - Phone Login Load Balancing Grouping Limit. If PLLB Grouping Limit is set to CASCADING at the campaign level then this setting will determine the number of agents acceptable on each server across all campaigns. Default is 100.

**Generate Cross-Server Phone Extensions** - This option if set to 1 will generate dialplan entries for every phone on a multi-server system. Default is 0 for inactive.

**USA-Canada Phone Number Dialcode Fix** -This option if set to 1 will trigger a process that will run at the Timeclock End of Day and will check all phone numbers to populate the dial code, or phone code, field with a 1 if it is missing as well as remove a leading 1 from the phone number field if it is present. Default is 0 for inactive.

**Default Phone Code** -This setting will be used to fill in the Phone Code field on manual dial calls from the agent screen, also called Dial Code in some places. Default is 1.

**User Territories Active** - This setting allows you to enable the User Territories settings from the user modification screen. This feature was added to allow for more integration with a customized Vtiger installation but can have applications in a pure Dialer system as well. Default is 0 for disabled.

**User Codes Admin Pulldown** - This option if enabled will only allow User Level 9 users to modify the User Code field on the User Modify page, and it will change the User Code field to a pulldown menu, the options for which are stored in the USER\_CODES\_SYSTEM Settings Container. Setting this to -2- will use the user\_codes\_admin.txt file in the admin web directory for the User Codes pulldown list instead of the Settings Container. The list of available User Codes can be just a list of User Codes with one on each line, or each line can have a User Code and an optional description with a pipe separating the two fields. Default is 0 for disabled.

**List Status Modification Confirmation** - This setting will cause the admin interface to request a confirmation whenever a user submits a change to the campaign settings or list settings that involves modifying the -Active- status of a list. Default is 0 for disabled.

**Enable First Webform** - This setting allows you to have a web form for campaigns and in-groups in the agent interface. Default is 1 for enabled.

**Enable Second Webform** - This setting allows you to have a second web form for campaigns and in-groups in the agent interface. Default is 1 for enabled.

**Enable Third Webform** - This setting allows you to have a third web form for campaigns and in-groups in the agent interface. Default is 0 for disabled.

**Enable Second Script Tab** - This setting allows you to have a second script tab for campaigns and in the agent interface. Default is 0 for disabled.

**Enable TTS Integration** - This setting allows you to enable Text To Speech integration with Cepstral. This is currently only available for outbound Survey type campaigns. Default is 0 for disabled.

**Enable CallCard** - This setting enables the CallCard features with Dialer to allow for callers to use pin numbers and card\_ids that have a balance of minutes and those balances can have agent talk time on customer calls to in-groups deducted. Default is 0 for disabled.

**Enable Campaign Test Calls** - This setting enables the ability to enter a phone code and phone number into fields at the bottom of the Campaign Detail screen and place a phone call to that number as if it were a lead being auto-dialed in the system. The phone number will be stored as a new lead in the manual dial list ID list. The campaign must be active for this feature to be enabled, and it is recommended that the lists assigned to the campaign all be set to inactive. The dial prefix, dial timeout and all other dialing related features, except for DNC and call time options, will affect the dialing of the test number. The phone call will be placed on the server selected as the voicemail server in the system settings. Default is 0 for disabled.

**DID System Filter** - This setting enables the special did\_system\_filter DID entry. The filter settings in this DID entry will be applied to all incoming calls to the system, prior to any other actions on the call. This feature is commonly used for system-wide inbound blacklists, or filtering of do-not-contact phone numbers. Default is 0 for disabled.

**Inbound Answer Configuration** - If enabled, this allows you to override the default behavior with inbound calls automatically being answered when they are routed. After this is enabled, you will see

options to define if an Answer signal is sent at the individual DID, In-Group or Call Menu level. Default is 0 for disabled.

**Enable Abandon Check Queue** - If enabled, this allows you to use the Abandon Check Queue to call back customers that called in to your system but did not talk to an agent. See the details for this feature at the bottom of the INBOUND\_CALLBACK\_QUEUE.txt document. Default is 0 for disabled.

**Enable Interational DNCs** - If enabled, this allows you to create DNC lists for individual countries and provides the option to scrub against these lists when loading lead files.

**New Leads Per List Limit** -This setting enables the new lead limits per list to be set on the list modify page and the user list new lead limit page. This feature will only work properly if the campaign is set to either the MANUAL or INBOUND\_MAN Dial Method and No Hopper dialing is enabled. Default is 0 for disabled.

**User List New Lead Limits Page** - If the system setting for New Leads Per List Limit is enabled, then this page allows for the setting of per-user per-list new lead limit overrides to those List limits. This feature will only work properly if the campaign is set to either the MANUAL or INBOUND\_MAN Dial Method and No Hopper dialing is enabled.

**Enable Daily Called Count Limits** - Enabling this setting will allow you to define a daily called count limit on a per campaign basis. Default is 0 for disabled.

**Enable 24-Hour Called Count Limits** - Enabling this setting will allow you to define a 24-hour called count limit on a per campaign basis. Default is 0 for disabled.

**Call Quota Lead Ranking** - This setting allows you to use the campaign setting for Call Quota Lead Ranking, which allows for a complex set of recycle dialing priorities for non-contact calls. Default is 0 for disabled. See the Call Quota Lead Ranking section further down in this manual for more detailed information on how this set of features works.

**Enable Custom List Fields** - This setting enables the custom list fields feature that allows for custom data fields to be defined in the administration web interface on a per-list basis and then have those fields available in a FORM tab to the agent in the agent web interface. (This must also be enabled on the User level to add, modify, or delete Custom Fields. Default is 0 for disabled.

**Enable Expanded List Stats** - This setting enables two additional columns to be displayed on most of the List status breakdown tables on the list modification and campaign modification pages. Penetration is defined as the percent of leads that are at or above the campaign Call Count Limit and-or the status is marked as Completed. Default is 1 for enabled.

**Hide Inactive Lists** - This setting allows you to hide inactive lists from the Lists Listing page. Similar to the default Users feature, a link to display all lists will be available at the top of the listings section. Default is 0 for disabled.

**Country Code List Stats** -This setting if enabled will show a country code breakdown summary on the list modify screen. Default is 0 for disabled.

**Enable DID Entry List ID** - This setting if enabled will allow a manager to define an entry list id to use on the DID modify screen. Default is 0 for disabled.

**Lead Manager Active Lists** - This setting if enabled will allow a manager to select active lists for modification within the Lead Management admin utilities. We do not recommend enabling this option since it can cause issues with leads that could be part of active calling within the system. Default is 0 for disabled.

**Enable GDPR-compliant Data Download Deletion** - This setting if enabled will allow for the complete download and/or deletion of all customer data for a particular lead, in compliance with the General Data Protection Regulation (GDPR). Default is 0 for disabled. A setting of 1 will enable downloading data, and a setting of 2 will enable not just downloading, but also deletion of data, including any recordings.

**Expired Lists Auto Inactive** - This setting if enabled will automatically change lists that have an expiration date set to a past date to Active equals N. This is performed through both a check every time the List Modify screen is loaded for a specific list as well as a once an hour check on all lists. Default is 0 for disabled.

**Enable Drop Lists** - This setting if enabled will make the Drop Lists feature appear under the LISTS menu. This feature set can take dropped call log records and create new leads in a list from multiple inbound groups. Default is 0 for disabled.

**Admin Lead Source ID Display** - This setting will make the Source ID lead field show up in the Admin Modify Lead screen. Default is 0 for disabled.

**Allow Web DB Debug** - This option will allow the DB query string option to be used in most web pages on this system to show debug output. Default is 0 for disabled.

**Agent Screen Debug Logging** - This setting if enabled will log almost all agent screen mouse clicks and AJAX processes triggered by the agent screen. To enable for all agents, set this option to 1. To enable only for one agent on the system, set this option to the user that you want to log. Warning, this feature can log hundreds of entries per phone call, so use with caution. These agent debug records are deleted after 7 days. Default is 0 for disabled.

**Agent Screen Timer** - This will select the method of JavaScript timer to be used by the Agent Screen. The original method is `setTimeout`, which maintains the timer directly in JavaScript. An alternative method is `EventSource`, which uses a script on the server to trigger the timer. You may want to use `EventSource` if your agents are using a Chromium-based web browser that has limitations on how native JavaScript timers work, although using this method may possibly cause issues if you have a poor network connection to the server or are on an older network or proxy that does not handle streaming web services well. Default is `setTimeout`

**Enhanced Disconnect Logging** - This setting, set to 1, enables logging of calls that get a CONGESTION signal with a cause code of 1, 19, 21, 34 or 38. Setting this to 2 will additionally log calls with cause codes of 18-CHANUNAVAIL and 102. Setting this to 3 will alternatively prevent some temporary error SIP messages on failed calls from sending the lead to ADC status. Instead, the status will be set as HUCXXX where XXX is the hangup\_cause code. Eg. HUC18 for Cause 18 (SIP

408 Request timeout). Default is 0 for disabled.

**SIP Event Logging** - This setting will enable logging of SIP events on outbound phone calls for servers that are running patched versions of Asterisk 13 or higher. Default is 0 for disabled.

**Cached Realtime Carrier Stats** - This setting if enabled will change the real-time report from gathering the carrier log stats every time it is refreshed on every screen it is running on, to a cached set of carrier log stats that are refreshed once per minute. Default is 0 for disabled.

**Enable CID Groups and Campaign Areacode CID** - This setting enables the ability to set specific outbound callerid numbers to be used per areacode for a campaign, as well as CID Groups which allows both per areacode and per state options for groups of CallerID numbers for one or multiple campaigns. Default is 1 for enabled.

**Outbound Call Any CID** - This option allows you to use any Outbound CallerID that is set in the Agent API external\_dial function to override whatever the settings for the campaign say the CID should be for that call. Default is DISABLED.

**OpenSIPs CID Name Support** - If your system is using an OpenSIPs server to route outbound phone calls, and your system administrator has set up that server to be able to send CallerID Name through it, you can enable this setting to allow you to define an OpenSIPs CallerID Name in the Campaign Detail screen. Default is 0 for disabled.

**Enable Remote Agent Extension Overrides** - This setting enables DIDs to have extension overrides for remote agent routed calls through in-groups. Default is 0 for disabled.

**Enable Agent Whisper Monitoring** - This setting allows a manager to be able to speak to a logged in agent without the customer being able to hear them. WARNING, this feature is considered experimental and may not function properly in some cases. Older versions of Asterisk have shown to have serious issues at times with this feature and can cause Asterisk to freeze or crash. Default is 0 for disabled.

**Enable User Hide RealTime** - This setting allows a User Modify setting to be changed to allow a user to be hidden from all managers in the Real-Time Report. Default is 0 for disabled.

**Enable Manual Dial Auto Next** - This setting allows the campaign setting to be enabled forcing a manual dial after X seconds in a manual or inbound manual dial mode. Default is 0 for disabled.

**Enable Manual Dial Validation** - This setting if set to 1 will allow you to enable the Manual Dial Validation feature on a per-campaign basis. If set to 2 the Manual Dial Validation feature will be forced as enabled on all campaigns on the system. The default is 0 for disabled.

**Enable Contacts** - Enables the Contacts sub-section in Admin interface. This allows managers to add, modify, or delete contacts in the system. They can be used as part of a Custom Transfer in a campaign where an agent can search for contacts (by first name, last name, or office number) and then select one of many phone numbers associated with that contact. This feature is often used by operators or in switchboard functions where the user would need to transfer a call to a non-agent phone. Default is 0 for disabled.

**Call Menu Qualify Enabled** - This setting enables the option in Call Menus to put a SQL qualification on the people that hear that call menu. For more information on how that feature works, view the help for Call Menus. Default is 0 for disabled.

**Call Menu Alt DTMF Logging** -This setting enables the option in Call Menus to log the DTMF responses to an alternate database table. This can be used in addition to the default DTMF lead logging option. Default is 0 for disabled.

**Allow IP Lists** - This setting allows the IP Lists admin section to be used, as well as the User Group options for web access whitelists and the System Settings option for a system-wide web blacklist. Default is 0 for disabled.

**System IP Blacklist** - If Allow IP Lists above are enabled, this option will allow you to set an IP List as a blacklist for IP addresses that are not able to access the web resources of this system. Default DISABLED.

**Level 8 Disable Add** - System Settings option to disable Add/Copy admin functions for level 8 users. If enabled, this will prevent any level 8 user from adding or copying any record in the system, no matter what their user settings are. Excluded from these restrictions are the ability to add DNC and Filter Phone Groups numbers and the Add a New Lead page. Default is 0 for disabled.

**Script Text Remove JS** -This setting if enabled will remove any javascript that is included in the script text for a script. This is considered a security feature to prevent cross-site scripting, or XSS. Default is 1 for enabled.

**Admin List Counts Link** - This disables the list counts that appear on the Lists listing and the Campaign modify screens. Default is 1 for enabled.

**Allow Emails** - This sets whether this system will be able to receive inbound emails in addition to phone calls.

**Allow Chats** -This is where you can set whether this system will be able to receive incoming chats in addition to phone calls, as well as allow agent-to-agent and agent-to-manager chatting.

**Chat Timeout in seconds** -This is where you can set how long a customer chat can stay alive after the customer has navigated away from or closed their chat window. When the timeout is reached the chat is closed.

**Chat URL** -This is the location where you have placed the chat web pages for customer use.

**Agent Push Events** - This setting will enable the sending of events from agent screens to the URL defined below. Default is 0 for disabled. For more information on how Agent Push Events works, go here: [http://dialer.org/docs/AGENT\\_EVENTS\\_PUSH.txt](http://dialer.org/docs/AGENT_EVENTS_PUSH.txt)

*Warning:* If you enable this feature and set the Agent Push URL to a non-existent URL, or a URL that takes a long time to respond, your system may not function properly.

**Agent Push URL** - If Agent Push Events are enabled above, this is the URL that the events will be

sent to. The variables that you can use within the URL are --A--user--B--, --A--event--B--, --A--message--B--, --A--lead\_id--B--. Since this function uses AJAX, it must reference a local script on the web server. If you want to reference an external web address then you should use the get2post.php script that can be found in the extras directory.

**Log Recording Access** - This option if enabled allows the logging of user access to call recordings. It also requires the User setting Access Recordings to be set to 1 to allow a user to access call recordings. Default is 0 for disabled.

**Recording Buttons Type** - This option allows you to choose the appearance of the recording buttons on the agent screen. START\_STOP will show a START RECORDING button if the call is not recording and a STOP RECORDING button when the call is recording. The RECORDING option will show a red NOT RECORDING button if the call is not recording and a green RECORDING button when the call is recording. If NOGAP is part of the option, then the space below the recording button will be removed. If 2xHEIGHT is part of the option, then the recording button will be double the height. Default is START\_STOP.

**Allow Mute Recordings** - This option if enabled allows you to enable the MUTE RECORDING button on the agent screen by campaign and-or user. This feature is only tested with systems running Asterisk 13. You should not mute recordings for more than 15 minutes at a time. Default is 0 for disabled.

**Enable Automated Reports** - This option if enabled allows you access to the Automated Reports section where you can set up reports to run at scheduled times and be delivered by email or FTP. Default is 0 for disabled.

**First Login Trigger** - This setting allows for the initial configuration of the server screen to be shown to the administrator when they first log into the system.

**User Password Minimum Length** - If set above 0, this setting will require that user passwords, phone and server passwords, and system settings default passwords be at least this minimum length of characters when those records settings are modified on the Modify pages. The most important factor in password security is the length of the password, and user passwords in this system can be up to 100 characters in length. Default is 0 for disabled.

**Two-Factor Auth Hours** - Two-Factor-Authentication, 2FA for short, adds a required second step to the login process through a method other than a password, such as an Email, Phone Call or Text-Message -SMS-. This 2FA Auth Hours field is where you define the number of hours each auth will last, or until the user logs out. Currently, 2FA is not available for agent screen logins. Default is 0 for 2FA disabled. WARNING, if you enable this without properly configuring the 2FA settings container below, you will lock all users out of the admin web screens and a System Administrator will have to fix your system.

**Two-Factor Auth Config Container** - Must be a valid 2FA\_SETTINGS Container Type for 2FA to work. For more information on the settings that can be used in that container, please see the - 2FA\_TWO\_FACTOR\_AUTHENTICATION.txt- document: [http://dialer.org/docs/2FA\\_TWO\\_FACTOR\\_AUTHENTICATION.txt](http://dialer.org/docs/2FA_TWO_FACTOR_AUTHENTICATION.txt)



**User Login Link Emails Allowed** - The feature will allow you to click on a link from the User Modify page to send an email to an agent with a shortcut URL web address that will allow them to more easily log in to the agent screen. You can select options to send these emails with or without the user password included. Default is DISABLED.

**Default Phones Settings Container** - This feature allows you to use a settings container of the type PHONE\_DEFAULTS to pre-load numerous settings into the phone creation form and create new phones with these values pre-set. Refer to the PHONE\_DEFAULTS settings container for an example of a container with all available settings that can be pre-set. Default is ---DISABLED---

**Default Phone Registration Password** - This is the default phone registration password. It's used when new phones are added to the system. Default is test.

**Default Phone Login Password** - This is the default phone web login password used when new phones are added to the system. Default is test.

**Default Server Password** - This is the default server password used when new servers are added to the system. Default is test.

**Report Default Format** - Determines whether the reports will default to display in text or html format. Default is TEXT.

**Slave Database Server** - If you have a MySQL slave database server then enter the local IP address for that server here. This option is currently available to be used by most of the reports in the system, shown in the next option. These settings have nothing to do with automatically configuring MySQL master-slave replication, your Administrator has to do that. Default is empty for disabled.

**Reports to use Slave DB** - This option allows you to select the reports that you want to have use the MySQL slave database as defined in the option above instead of the master database that your live Dialer system is running on. You must set up the MySQL slave replication before you can enable this option. Default is empty for disabled.

**Custom Reports to use Slave DB** - This option allows you to select the custom reports that you want to have use the MySQL slave database as defined in the option above instead of the master database that your live system is running on. You must set up the MySQL slave replication before you can enable this option. Default is empty for disabled.

**Custom Dialplan Entry** - This field allows you to enter in any dialplan elements that you want for all of the asterisk servers, the lines will be added to the default context.

**Reload Dialplan On Servers** - This option allows you to force a reload of the dialplan on all Asterisk servers in the cluster. If you made changes in the Custom Dialplan Entry above you should set this to 1 and submit to have those changes go into effect on the servers.

**Hide Label in Call Logs** - If a label is set to ---HIDE--- then the agent call logs, if enabled on the campaign, will still show the field and data unless this option is set to Y. Default is N.

**Default Field Labels** - These 19 fields allow you to change the field name, as it will appear in the

Dialer agent interface (as well as the administrative modify lead page). Keep in mind the old field name will still appear when using the web-based lead loader. Default is empty which will use the hard-coded defaults in the agent interface. You can also set a label to ---HIDE--- to hide both the label and the field. Another option for most fields is ---READONLY--- which will display but not allow an agent to modify the field. One more option for most fields is ---REQUIRED--- which will force an agent to populate that field on all calls before being able to hang up and disposition each call. For the REQUIRED option to work, the campaign must have Allow Required Fields enabled.

**Admin Screen Colors** - This feature allows you to set different color schemes and logo for the administrative web screens. These can be defined in the Screen Colors section. Default is default, for the standard blue screen colors

**Agent Screen Colors** - This feature allows you to set different color schemes and logo for the agent screen. These can be defined in the Screen Colors section. Default is default, for the standard blue screen colors

**Agent Chat Screen Colors** - This feature allows you to set the different colors that are used for the users chatting within the internal chat window in the agent screen. These can be defined in the Screen Colors section, and only the five standard and three alternate colors are used. Default is default, for a standard set of eight colors.

**QC Features Active** - This option allows you to enable or disable the QC or Quality Control features. Default is 0 for inactive. This feature is non-functional.

**QC Last Pull Time** – The time & date of the last QC query.

**QC Claim Limit** - This option allows you to put a limit on the number of QC records an agent can claim for themselves without finishing them. Default is 3.

**QC Expire Days** - This option allows you to limit the number of days an unclaimed QC call will be available to claim and evaluate. Default is 3 days.

**Default Codecs** - You can define a comma delimited list of codecs to be set as the default codecs for all systems. Options for codecs include ulaw, alaw, gsm, g729, speex, g722, g723, g726, ilbc, opus, slin, g719,... Default is empty.

**Default Webphone** - If set to 1, this option will make all new phones created have Set As Webphone set to Y. Default is 0.

**Default External Server IP** - If set to 1, this option will make all new phones created have Use External Server IP set to Y. Default is 0.

**Webphone URL** - This is the URL of the webphone that will be used with this system if it is enabled in the phones record that an agent is using. Default is empty.

**Webphone System Key** - If your system or provider requires it, this is where the System Key for the webphone should be entered in. Default is empty.

**No-Answer Log** - This option will log the auto-dial calls that are not answered to a separate table. Default is N.

**DID Agent Log** - This option will log the inbound DID calls along with an in-group and user ID, if applicable, to a separate table. Default is N.

**Alt-Log DB Server** - This is the alternate log database server. This is optional, and allows some logs to be written to a separate database. Default is empty.

**Alt-Log DB Name** - The database name for the Alt-Log database. Default is empty.

**Alt-Log DB Login** - The login user for the Alt-Log database. Default is empty.

**Alt-Log DB Password** - The password for the Alt-Log database. Default is empty.

**Alt-Log Tables** - These are the tables that are available for logging on the alternate log database server. Default is blank.

**Enable QueueMetrics Logging** - This setting allows you to define whether Dialer will insert log entries into the queue\_log database table as Asterisk Queues activity does. QueueMetrics is a standalone, closed-source statistical analysis program. You must have QueueMetrics already installed and configured before enabling this feature. Default is 0.

**QueueMetrics Server IP** - This is the IP address of the database for your QueueMetrics installation.

**QueueMetrics Database Name** - This is the database name for your QueueMetrics database.

**QueueMetrics Database Login** - This is the user name used to log in to your QueueMetrics database.

**QueueMetrics Database Password** - This is the password used to log in to your QueueMetrics database.

**QueueMetrics URL** - This is the URL or web site address used to get to your QueueMetrics installation.

**QueueMetrics Log ID** - This is the server ID that all Dialer logs going into the QueueMetrics database will use as an identifier for each record.

**QueueMetrics EnterQueue Prepend** - This field is used to allow for prepending of one of the Dialer \_list data fields in front of the phone number of the customer for customized QueueMetrics reports. Default is NONE to not populate anything.

**QueueMetrics Login-Out** - This option affects how dialer will log the logins and logouts of an agent in the queue\_log. STANDARD uses the normal AGENTLOGIN AGENTLOGOFF. CALLBACK will use AGENTCALLBACKLOGIN and AGENTCALLBACKLOGOFF that QM will parse different. NONE will not log any logins and logouts within queue\_log. Default is STANDARD.

**QueueMetrics CallStatus** - This option if set to 0 will not put in the CALLSTATUS entry into queue\_log when an agent dispositions a call. Default is 1 for enabled.

**QueueMetrics Addmember Enabled** - This option if set to 1 will generate ADDMEMBER2 and REMOVEMEMBER entries in queue\_log. Default is 0 for disabled.

**QueueMetrics Dispo Pause Code** - This option, if populated, allows you to define whether a dispo pause code is entered into queue\_log when an agent is in dispo status. Default is empty for disabled.

**QueueMetrics Pause Type Logging** -If enabled, this option will log the type of pause in the queue\_log table data5 field. You must make sure that you have a data5 field or enabling this feature will break QM compatibility. Default is 0 for disabled.

**QueueMetrics PAUSEREASON Logging** - If set to EVERY\_NEW, this will start a new pause session within the queue log for each pause code that happens, starting when the pause code is set. The STANDARD default behavior is for QM to only use the last PAUSEREASON in any single pause session in its reports. Default is STANDARD.

**QueueMetrics Phone Environment Phone Append** - This option, if enabled, will append the agent phone login to the data record in the queue log table if the Campaign Phone Environment field is populated. Default is 0 for disabled.

**QueueMetrics Hold Call Log** -This option, if enabled, will log when a customer is put on hold and taken off hold in the newer record\_tags QM table. Default is 0 for disabled.

**QueueMetrics Socket Send** - If enabled, this will send QM data to a web page that will send it through a socket for logging. The CONNECT\_COMPLETE option will send CONNECT, COMPLETEAGENT and COMPLETECALLER events to the url defined below. Default is NONE for disabled.

**QueueMetrics Socket Send URL** - If Socket Send is enabled above, this is the URL used to send the data to. Default is EMPTY for disabled.

**Enable Vtiger Integration** - This setting allows you to enable Vtiger integration with Dialer . Currently links to Vtiger admin and search as well as user replication are the only integration features available. Default is 0.

**Vtiger DB Server IP** - This is the IP address of the database for your Vtiger installation.

**Vtiger Database Name** - This is the database name for your Vtiger database.

**Vtiger Database Login** - This is the user name used to log in to your Vtiger database.

**Vtiger Database Password** - This is the password used to log in to your Vtiger database.

**Vtiger URL** - This is the URL or web site address used to get to your Vtiger installation.

ADMINISTRATION			STATUSES WITHIN THIS SYSTEM: ?										MIN SEC	MAX SEC	MODIFY/DELETE	
STATUS	DESCRIPTION	CATEGORY	AGENT SELECTABLE	HUMAN ANSWER	SALE	DNC	CUSTOMER CONTACT	NOT INTERESTED	UNWORKABLE	SCHEDULED CALLBACK	COMPLETED	ANSWERING MACHINE				
A	Answering Machine	UNDEFINED - Default Category	Y	N	N	N	N	N	N	N	N	Y	0	0	MODIFY	DELETE
AA	Answering Machine Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AB	Busy Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
ADC	Disconnected Number Auto	UNDEFINED - Default Category	N	N	N	N	N	N	Y	N	N	N	0	0	MODIFY	DELETE
ADCT	Disconnected Number Temp	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AFAX	Fax Machine Auto	UNDEFINED - Default Category	N	N	N	N	N	N	Y	N	N	N	0	0	MODIFY	DELETE
AFTHRS	Inbound After Hours Drop	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AL	Answering Machine Msg Pla	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	Y	0	0	MODIFY	DELETE

Figure 35. System Statuses

## ADMIN - SYSTEM STATUSES

You can add, modify and delete system-wide statuses in the SYSTEM STATUSES sub-section of the Admin section. Through the use of system statuses, you can have statuses that exist for campaign and in-group. The Status must be 1-6 characters in length, the description must be 2-30 characters in length. Agent Selectable defines whether it shows up in the Dialer agent screen as an agent disposition. The human\_answered field is used when calculating the drop percentage, or abandon rate. Setting human\_answered to Y will use this status when counting the human-answered calls. Sale will include this status when calculating total sales. DNC indicates that status should not be called again, that it will be included in the calculation of of DNC totals, and (depending on the campaign setting) that it could be added to the internal & campaign DNC lists. Customer Contact indicates that the call was answered by a person, and will be included when calculating total human answered calls. Not Interested indicates the status should not be called again, but it is not included on any DNC lists. Unworkable indicates that the lead is not viable, regardless of whether the customer was interested or not. When Callback is set to Y, it allows any status to become a “Callback type”. It will pop open a calendar, and prompt the agent to indicate the callback date & time. Completed indicates that the lead is done and does not need to be called any further, but does not fall under the DNC, Not Interested, or Unworkable categories. It's used in the calculation of several reports. Answering Machine is a flag for agent-set answering machine calls. The Category option allows you to group several statuses into a category that can be used for statistical analysis.

Here is a list of the default system statuses in Dialer and what they mean:

NEW - New Lead - Lead has not been called, or cannot be called

QUEUE - Lead To Be Called - Lead is about to be sent to an agent

INCALL - Lead Being Called - Agent is talking to the lead

DROP - Agent Not Available - Call was dropped while customer was waiting for an agent

XDROP - Agent Not Available IN - Call was dropped while customer was waiting for an agent on an

inbound call

NA - No Answer AutoDial - Any outbound call that does not receive an Answer signal(or other signal) from the carrier. This can include ring-no-answer, disconnected, carrier congestion and other errors

CALLBK - Call Back - Callback, both scheduled and non-scheduled

CBHOLD - Call Back Hold - Scheduled ANYONE callback that has not hit it's trigger, or an AGENTONLY callback

A - Answering Machine - Agent-defined Answering Machine

AA - Answering Machine Auto - Dialer-defined Answering Machine

AM - Answering Machine Sent to Mesg - AMD(Answering Machine Detection) call sent to a message to be played

AL - Answering Machine Msg Played - AMD(Answering Machine Detection) call sent to a message and message has been played

AMDXFR - Answering Machine Transfer to Call Menu or In-Group

AFAX - Fax Machine Auto - Dialer-defined Fax Machine

B - Busy - Agent-defined Busy signal

AB - Busy Auto - Carrier-received Busy signal

DC - Disconnected Number - Agent-Defined Disconnected number

ADC - Disconnected Number Auto - Carrier-received Disconnected number

ADCT - Congested Number Auto - Carrier-received Congestion(19,21,34,38)

DEC - Declined Sale - Agent-defined status

ADCCAR - Disconnect Carrier-Defined, used by TILTX service

DNC - DO NOT CALL - If defined, lead will also go in the DIALER DNC list

DNCL - DO NOT CALL Hopper Match - status of a lead that matches the phone number of a lead that has been placed in the DIALER DNC list

DNCC - DO NOT CALL Hopper Match Campaign- status of a lead that matches the phone number of a lead that has been placed in the DIALER Campaign-specific DNC list for this Campaign DNCCAR

- DO NOT CALL Carrier-Defined, used by TILTX service

SALE - Sale Made - Agent-defined status

N - No Answer - Agent-defined status

NI - Not Interested - Agent-defined status

NP - No Pitch No Price - Agent-defined status

PU - Call Picked Up - Status that a call is changed to as soon as the carrier has sent the Answer signal and before the call is sent on to an agent

PM - Played Message - outbound broadcast or SURVEY campaign status for when a message has been played to the customer

XFER - Call Transferred - Call has been sent from an agent to a Closer agent

ERI - Agent Error - An agent has closed their browser before dispositioning a lead

DONEM - Agent placed a manual dial phone call and then closed their browser before dispositioning a lead

SVYEXT - Survey sent to Extension - Survey outbound campaign status only

SVYVM - Survey sent to Voicemail - Survey outbound campaign status only

SVYHU - Survey Hungup - Survey outbound campaign status only

SVYREC - Survey sent to Record - Survey outbound campaign status only

HXFER - Hold Recall Transfer to another in-group

HOLDTO - Hold time option call termination on inbound call

QVMAIL - Queue Abandon Voicemail Left

RQXFER - Re-Queue Transfer back to agent

CPDATB - Sangoma Call Progress Detection CPD All-Trunks-Busy

CPDB - Sangoma Call Progress Detection CPD Busy  
CPDNA - Sangoma Call Progress Detection CPD No-Answer  
CPDREJ - Sangoma Call Progress Detection CPD Reject  
CPDINV - Sangoma Call Progress Detection CPD Invalid-Number  
CPDSUA - Sangoma Call Progress Detection CPD Service-Unavailable  
CPDSI - Sangoma Call Progress Detection CPD Sit-Intercept  
CPDSNC - Sangoma Call Progress Detection CPD Sit-No-Circuit  
CPDSR - Sangoma Call Progress Detection CPD Sit-Reorder  
CPDSUK - Sangoma Call Progress Detection CPD Sit-Unknown  
CPDSV - Sangoma Call Progress Detection CPD Sit-Vacant  
CPDUK - Sangoma Call Progress Detection CPD Unknown  
CPDERR - Sangoma Call Progress Detection CPD Error  
TIMEOT - Inbound call Drop Timeout, call waited until drop-seconds and was sent on to the drop action  
AFTHRS - Inbound after hours drop, call received outside of in-group call time  
NANQUE - Inbound no agent no queue drop, no agent logged in  
RAXFER - Remote Agent API transfer  
ALTNUM - Agent manual Dial Alternate number dialing, number dialed before final disposition  
DISPO - Agent in disposition screen when they closed their web browser without selecting disposition  
WAITTO - Wait time option call termination on inbound call  
PDROP - Pre-routing dropped call, call hung up the instant the Answer signal is received  
IVRXFR - Outbound drop to Call Menu  
SVYCLM - Survey sent to Call Menu - Survey outbound campaign status only  
MLINAT - Multi-Lead auto-alt-dial lead set to inactive  
MAXCAL - Max Calls drop from in-group  
LRERR - Outbound Local Channel Resolution Error  
QCFAIL - QC\_FAIL\_CALLBK  
QCCANC - QC cancel  
QCPASS - QC passed  
LSMERG - Agent lead search old lead merge  
DISMX - Dispo Call Max Status  
INBND - first status of a newly created lead going into the inbound queueing process  
UNKXFR - CPD Unknown result Transfer to Call Menu or In-Group  
UNKAM - CPD Unknown call sent to a message to be played  
UNKAL - CPD Unknown call sent to a message and message has been played  
NVAINS - Default status for new inserted lead on phone NVA call  
CLOSOP - In-Group Closing-Time option selected  
PAUSMX - Pause Max Seconds timeout default status  
IQNANQ - In-Queue call No-Agent-No-Queue drop



Figure 36. System Status Categories

## ADMIN - SYSTEM STATUS CATEGORIES

Through the use of system status categories, you can group together statuses to allow for statistical analysis on a group of statuses. The Category ID must be 2-20 characters in length with no spaces, the name must be 2-50 characters in length, the description is optional and Realtime Display defines whether that status will be one of the up to 4 statuses that can be calculated and displayed on the Real-Time report.



STATUS GROUP ID	NOTES	GROUP	STATUSES	MODIFY
alt_list_statuses	Alternate List statuses	--ALL--	1	<a href="#">MODIFY</a>

**Figure 37. System Status Group Listings**

## ADMIN - STATUS GROUPS

Through the use of status groups, you can override the campaign statuses for calls placed within a specific list or handled by a specific In-Group where a Status Group is set. The Status must be 1-6 characters in length, the description must be 2-30 characters in length and Selectable defines whether it shows up in the system as an agent disposition. The `human_answered` field is used when calculating the drop percentage, or abandon rate. Setting `human_answered` to Y will use this status when counting the human-answered calls. The Category option allows you to group several statuses into a category that can be used for statistical analysis. There are also 7 additional settings that will define the kind of status: sale, dnc, customer contact, not interested, unworkable, scheduled callback, completed. The MIN SEC and MAX SEC fields for each status will determine whether an agent can select that status at the end of their call based upon the length of the call. If the call is 10 seconds and the MIN SEC for a status is set to 20 seconds, then the agent will not be able to select that status. Also, if a call is 40 seconds and the MAX SEC for a status is set to 30 seconds, then the agent will not be able to select that status. The Status Group ID field must be between 2 and 20 characters in length, must not match a current campaign ID, and cannot contain spaces or other special characters.

CID GROUP ID	NOTES	TYPE	GROUP	CIDS	MODIFY
NO_GEO_LIST	One national CID list	NONE	AR	7	<a href="#">MODIFY</a>
TEST_NONE	Testing none type cid group	NONE	AR	6	<a href="#">MODIFY</a>
testing_here	this is a test 2	AREACODE	--ALL--	3	<a href="#">MODIFY</a>
testing_here3	testing here 3 state	STATE	--ALL--	5	<a href="#">MODIFY</a>
testing_here4	this is a test 4	AREACODE	--ALL--	13	<a href="#">MODIFY</a>
testing_here5	this is a test 5	STATE	--ALL--	10	<a href="#">MODIFY</a>
testing_state	testing state	STATE	--ALL--	0	<a href="#">MODIFY</a>

Figure 38. CID Group Listings

## ADMIN - CID GROUPS

CID Groups are very similar to Campaign AC-CID, except with CID Groups you can use the same set of CIDs across multiple campaigns, and you can also define CID Groups on a per-state basis as well as per-areacode, instead of just by areacode like with Campaign AC-CID. There is also the option to have no geographic separations and to just use a group of CIDs to call all numbers. If the STATE type is used, then the STATE value should match the state field for a lead, and if no match is found, the dialer will use the campaign CID as a default. If the NONE type is used, then the active CIDs will be rotated with every call made.

### ***CID Auto-Rotation options only available with a NONE CID Group Type:***

**CID Auto Rotate Minutes** - This feature only works with CID Groups, and only when the CID Group Type of NONE is used. This feature allows the system to automatically rotate the Caller IDs in the CID Group from inactive to active, leaving only one CID active at a time, every X minutes as long as active dialing is happening. This feature will rotate though all CIDs in the CID Group whether it is active or not unless the CID has a description of NOROTATE. For reference, one hour is 60 minutes, 6 hours is 360 minutes, 12 hours is 720 minutes and 24 hours is 1440 minutes. Default is 0 for disabled.

**CID Auto Rotate Minimum** - Works together with the CID Auto Rotate Minutes setting above, if it is enabled, and will not rotate to the next CID until at least this number of calls have been placed while active for the current CID that is dialing. Default is 0 for no limit.

**CID Auto Rotate Calls, CID and Time** - Shows the number of calls placed using the current CID, the CID currently being used and the Date-Time the CID was activated.

## Figure 38. VM Message Group Listings

### ADMIN - VM Message Groups

Voicemail Message Groups are designed to allow agents to select from several messages to leave on a customer voicemail box when transferring to a voicemail message in the agent screen. The ID must be from 2 to 40 characters in length with no punctuation other than an underscore allowed. The Name must be from 5 to 255 characters in length. Active will determine if the VM Message Group is shown as an option in the campaign modify screen setting for VM Message Groups. For the Audio Files, you can define the order in which they appear on the agent screen by using the Rank setting. The Time Range will define what time of the customers day the message are displayed on the agent screen, in 2400 hours time format. The Display is what text will show up for this audio file on the agent screen.

### ADMIN - Queue Groups

Queue Groups are used by some reports to show stats from a group of campaigns and-or inbound groups. The ID must be from 2 to 20 characters in length with no punctuation other than an underscore allowed. The Name must be from 5 to 40 characters in length. Active will determine if the Queue Group is shown as an option in reports. For the Included Campaigns and Inbound Groups, you can select the ones that you want to be included in the Queue Group.

VOICEMAIL ID	Name	Active	New Messages	Old Messages	Delete	ADMIN GROUP	MODIFY
8101	sample voicemail box	N	0	0	N	---ALL---	<a href="#">MODIFY</a>

**Figure 39. Admin - Voicemail List**

## ADMIN - VOICEMAIL

If you click on the “Voicemail” link you will see the Voicemail list. This page will list the Voicemail box number, box name, active status, messages count, delete flag, admin group, and a link to modify the voicemail information. There are already voicemail boxes created for every Phones entry in the system. This section is for configuring additional general voicemail boxes. The most common use is as a message drop box from calls coming into one particular DID or Call Menu. However, voicemail can also be utilized anytime an agent is not available and you want the customer to leave contact information for follow up.

### **Add a New Voicemail Box**

You can get to the Add Voicemail screen by clicking on the "ADD A NEW VOICEMAIL ENTRY" link on the left side menu bar of the admin page. The add a voicemail screen has the 5 fields that are needed to have a valid voicemail record on the system (email is optional). As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new voicemail you must make sure that you set the voicemail ID and password or the submission will not be accepted. Also, please make sure that the voicemail ID you have chosen does not have any spaces or punctuation, only numbers.

### **Modify Voicemail**

*(screen shot of the Modify Voicemail screen available in the Appendix)*

From the Show Voicemail Entries screen you can click on the MODIFY link for any voicemail entry to modify it's record.

**Voicemail ID** - This is the (all numbers) identifier of this mailbox. This must not be a duplicate of an existing voicemail ID or the voicemail ID of a phone on the system, minimum of 2 characters.

**Password** - This is the password that is used to gain access to the voicemail box when dialing in to

check messages max 10 characters, minimum of 2 characters.

**Name** - This is name associated with this voicemail box. max 100 characters, minimum of 2 characters.

**Email** - This optional setting allows you to have the voicemail messages sent to an email account, if your system is set up to send out email. If this field is empty then no emails will be sent out.

**Active** - This option allows you to set the voicemail box to active or inactive. If the box is inactive you cannot leave messages on it and you cannot check messages in it.

**Admin User Group** - This is the administrative user group for this Voicemail record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Voicemail record.

**Delete Voicemail After Email** - This optional setting allows you to have the voicemail messages deleted from the system after they have been emailed out. Default is N.

**Show VM on Summary Screen** -This option will display this Voicemail Box information on the summary page seen when logging into the administration page. It will show the box name, new message count, old count, and total messages in the box. Note the table will not be shown unless you have set at least one mailbox to Y. Default is N for off.

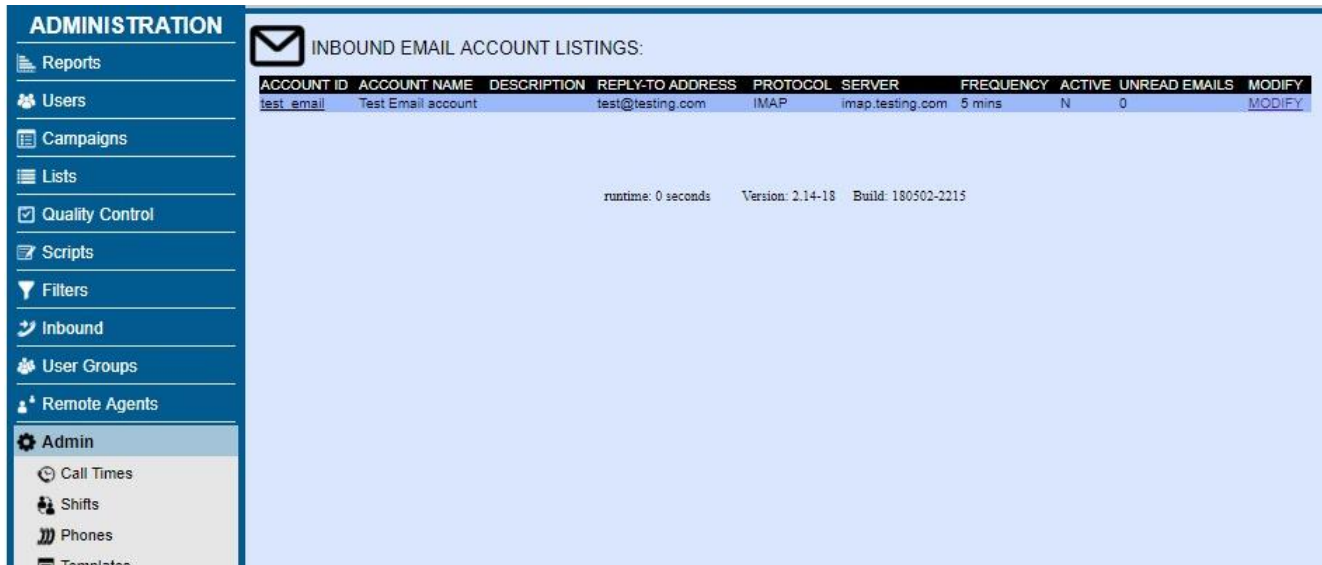
**Voicemail Greeting** - This optional setting allows you to define a voicemail greeting audio file from the audio store. The “Allow Voicemail Greeting Chooser” field must first be enabled in Admin-System Settings prior to use. Default is blank.

**Voicemail Zone** - This setting allows you to set the time zone that this voicemail box will be set to when the time is logged for a message. Default is set in the System Settings.

**Voicemail Options** - This optional setting allows you to define additional voicemail settings. It is recommended that you leave this blank unless you know what you are doing.

**New Messages** - Number of new voicemail messages for this voicemail box on the Asterisk server.

**Old Messages** - Number of old voicemail messages for this voicemail box on the Asterisk server.



**Figure 40. Admin – Email Accounts**

## ADMIN – Email Accounts

Inbound email handling support has been added to Dialer . Agents can now handle inbound/outbound calls and emails all on the same screen. Emails and calls work in much same fashion. Once the agent receives the email it is locked to their screen for them to work. Once they are done they will disposition the account and become available to take another call or email.

NOTE: To enable, your Administrator must add an "E" keepalive to ONLY ONE of your servers in the /etc/astguiclient.conf file. You will also need to enable email in System Settings. You also need the following perl cpan modules: LWP::UserAgent, HTML::Entities, HTML::Strip, HTML::FormatText, HTML::TreeBuilder, Switch, Time::Local, MIME::Decoder, Mail::POP3Client, Mail::IMAPClient, Mail::Message, IO::Socket::SSL, MIME::Base64, and MIME::QuotedPrint. Also, the inbound email parser must be added to the crontab of ONLY ONE server:

```
### inbound email parser
* * * * * /usr/share/astguiclient/AST_inbound_email_parser.pl
```

**Email Account ID** - The short name of the email account, between 2 and 20 characters in length (no spaces). This can not be edited after initial submission.

**Email Account Name** - The full name of the email account (between 2 and 30 characters in length).

**Active** - Determines whether this account will be checked for new email messages to be loaded into the dialer.

**Email Account Description** - Allows for a lengthy description, if needed, of the email account (255 characters max).

**Email Account Type** - Specifies whether the account is used for inbound or outbound email messages. Should be set to INBOUND.

**Admin User Group** - The administrative user group for this email group. This allows admin viewing of this in-group to be restricted by user group. Default is --ALL-- which allows any admin user to view this in-group.

**Email Account Protocol** - The email protocol used by the external account you are allowing Dialer to access. Currently only IMAP and POP3 accounts are supported.

**Auth Mode for POP3 protocol only** -The authorization mode to use when POP3 is the mail protocol on the email account. BEST is the default. It will use APOP if the server appears to support it and it can be used to successfully log on, then try similarly with CRAM-MD5, and finally PASS. APOP and CRAM-MD5 imply that an MD5 checksum will be used instead of sending your password in cleartext. However, if the server does not claim to support APOP or CRAM-MD5, the cleartext method will be used. Be careful. There are a few servers that will send a timestamp in the banner greeting, but APOP will not work with them, for instance if the server does not know your password in cleartext. If you think your authentication information is correct, you may have to use PASS for that server. The same applies to CRAM-MD5.

**Email Reply-to Address** - The email address of the account you are setting up access to. Replies to email messages from the agent interface will read as coming from this address.

**Email Account Server** - The email server that the account is housed on.

**Email Account User** - The login used to access the external email account. Usually it's the portion of the reply-to address before the @ symbol.

**Email Account Password** - The password used to access the external email account. This is usually set at the time the email account is created.

**Email Frequency Check Rate (mins)** - How often the external email account will be checked (in minutes). Currently, the highest rate of frequency is five minutes; some email providers will not allow more than three login attempts in fifteen minutes before locking the account for an indeterminate amount of time.

**In-Group ID** - The Email Group that email messages will be sent to

**Default List ID** - The List ID that leads will be inserted into, if necessary.

**In-Group Call Handle Method** - The action that will be taken when a new email is found in the external account. EMAIL means all email messages will be inserted into the list table as a new lead. EMAILLOOKUP will search the entire list table for the email address in the email column. If the lead is found, that lead list ID will be used in the record that goes into the email\_list table. EMAILLOOKUPRC does the same, but it will only search lists belonging to the campaign selected in the In-Group Campaign ID box below. EMAILLOOKUPRL will only search one particular list, which is indicated in the In-Group List ID box below.

**In-Group Agent Search Method** – This feature used to have meaning, now it will always override to LB (Load-Balanced). It will send the email to the next agent no matter what server they are on.

**In-Group List ID** – If the “In-Group Call Handle Method” is set to EMAILLOOKUPRL, this indicates the List ID of the list that will be searched.

**In-Group Campaign ID** - If the “In-Group Call Handle Method” is set to EMAILLOOKUPRC, this indicates the campaign of the list(s) that will be searched.

**Un-handled Emails** – The current number of emails waiting to be handled in the external mailbox.



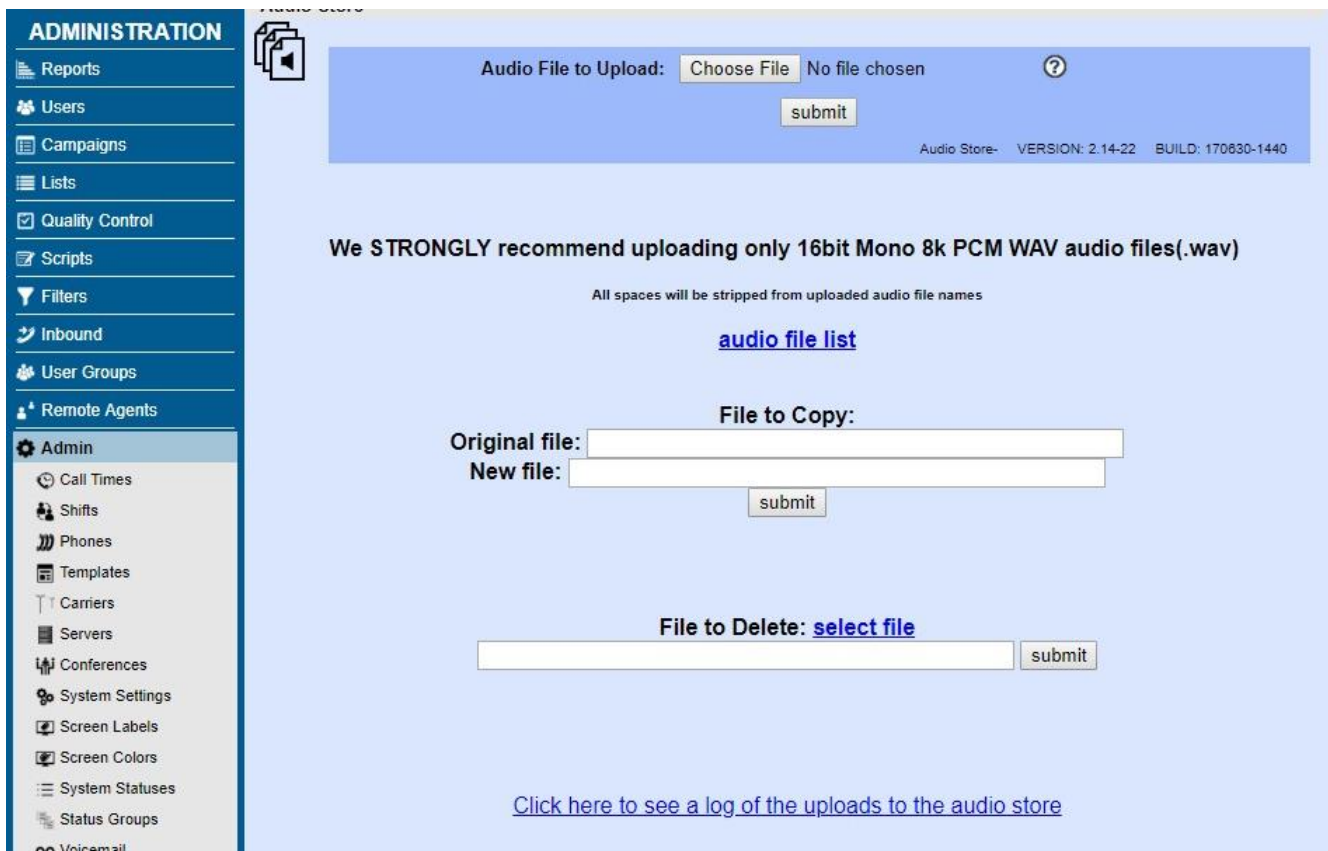


Figure 41. Admin – Audio Store

## ADMIN – AUDIO STORE

This utility allows you to upload audio files to the web server so that they can be distributed to all of the Dialer servers in a multi-server cluster. An important note, only two audio file types will work:

- .wav files that are PCM Mono 16bit 8k (for example: 1 channel, 8000 framerate, 16 bits, pcm uncompressed)
- .gsm files that are 8bit 8k.

Please verify that your files are properly formatted before uploading them here. After you have uploaded a .wav file, this page will attempt to validate the format of the file. If you see a red warning message, please re-format your audio file and upload it again. Uploading a file of the same filename will replace the older version of the same file on the audio store.

**Audio File List** – This link displays a complete listing of all the audio recordings currently held in the audio store. By default the most recently loaded files are at the top. The listing can be re-ordered by file name, upload date & time, and file size; in either ascending or descending order. This table will also allow all recordings to be downloaded or played.

**File to Delete** – This field allows for audio files to be deleted, one at a time, from the audio store. Enter the file name in the text field, press “submit”, and the file is removed.

**File to Copy** – This feature allows you to copy an audio file that is already in the Audio store to one with a different name.

MOH ID	MOH Name	Active	Random Order	ADMIN GROUP	MODIFY
default	Default Music On Hold	Y	N	--ALL--	<a href="#">MODIFY</a>

**Figure 42. Admin – Music On Hold List**

## ADMIN – MUSIC ON HOLD

If you click on the “Music On Hold” link you will see the Music On Hold list. This page will list the Music On Hold ID, name, active status, random order status, admin group, and a link to modify the music on hold information.

### ***Add a New Music On Hold Context***

You can get to the Add Music On Hold screen by clicking on the "ADD A NEW MOH ENTRY" link on the left side menu bar of the admin page. The add a music on hold screen has the 3 fields that are needed to have a valid music on hold record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new music on hold entry you must make sure that you set the music on hold ID and name or the submission will not be accepted. Also, please make sure that the music on hold ID you have chosen does not have any spaces or punctuation, only numbers.

### ***Modify Music On Hold***

*(screen shot of the Modify Music On Hold screen available in the Appendix)*

From the Show MOH Entries screen you can click on the MODIFY link for any music on hold entry to modify it's record.

**Music On Hold ID** - This is the short name of a Music On Hold entry. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 100 characters, minimum of 2 characters.

**Music On Hold Name** - This is a more descriptive name of the Music On Hold entry. This is a short summary of the Music On Hold context and will show as a comment in the musiconhold-Dialer .conf file. max 255 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this record.

**Active** - This option allows you to set the Music On Hold entry to active or inactive. Inactive will remove the entry from the conf files.

**Random Order** - This option allows you to define the playback of the audio files in a random order. If set to N then the defined order will be used.

**Audio Files** - This displays all audio files that make up the Music On Hold entry. The Rank pulldown allows you edit the order in which the audio files will play. The DELETE link can remove individual audio files from the MOH entry.

**Add An Audio File** - To add a new audio file to a Music On Hold entry the file must first be in the audio store, then you can select the file and click submit to add it to the file list. Music on hold is updated once per minute if there have been changes made. Any files not listed in a music on hold entry that are present in the music on hold folder will be deleted.

TTS ID	TTS Name	Active	TTS Voice	TTS Text	ADMIN GROUP	MODIFY
confirm_last_name	Confirm last name	Y	Allison-8kHz	Is this the members last name? break time=500ms/...	--ALL--	<a href="#">MODIFY</a>

Figure 43. Admin – Text-to-Speech(TTS) List

## ADMIN – TEXT TO SPEECH

If you click on the “Text To Speech” link you will see the Text to speech entry list. This page will list the TTS ID, name, active status, beginning of the prompt text and a link to modify the music on hold information. The text to speech functionality requires that Cepstral is installed and configured on your system by your systems administrator, and that the System Settings option for TTS is enabled. (See the Cepstral Integration section of this manual for more information)

NOTE: Cepstral requires at least one channel license, one voice and the save-to-file license for each server that you will use TTS on.

### **Add a New Text to Speech Entry**

You can get to the Add Text to Speech screen by clicking on the "ADD A NEW TTS ENTRY" link on the left side menu bar of the admin page. The add a text to speech screen has the 3 fields that are needed to have a valid text to speech record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new text to speech entry you must make sure that you set the TTS ID and name or the submission will not be accepted. Also, please make sure that the TTS ID you have chosen does not have any spaces or punctuation, only numbers and letters and underscores.

### **Modify Text to Speech Entry**

*(screen shot of the Modify Text To Speech screen available in the Appendix)*

From the Show TTS Entries screen you can click on the MODIFY link for any text to speech entry to modify it's record.

**TTS ID** - This is the short name of a TTS entry. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 50 characters, minimum of 2 characters.

**TTS Name** - This is a more descriptive name of the TTS entry. This is a short summary of the TTS definition. max 100 characters, minimum of 2 characters.

**Active** - This option allows you to set the TTS entry to active or inactive.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this record.

**TTS Voice** - This is where you define the voice to be used in the TTS generation. Default is Allison-8kHz.

**TTS Text** - This is the actual Text To Speech data field that is sent to Cepstral for creation of the audio file to be played to the customer. you can use Speech Synthesis Markup Language -SSML- in this field, for example, <break time='1000ms' /> for a 1 second break. You can also use several variables such as first name, last name and title as Dialer variables just like you do in a Script: --A--first\_name--B--. Here is a list of the available variables: lead\_id, entry\_date, modify\_date, status, user, vendor\_lead\_code, source\_id, list\_id, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, called\_count, last\_local\_call\_time, rank, owner

LABEL ID	Name	Active	ADMIN GROUP	MODIFY
reduced_labels	Reduced labels	Y	--ALL--	<a href="#">MODIFY</a>

**Figure 44. Screen Labels**

## ADMIN – SCREEN LABELS

Screen labels give you the option of setting different labels for the default agent screen fields on a per campaign basis. It is assigned in the Campaign modification page. Each Screen Label template will be listed in a pulldown named “Agent Screen Labels”. Keep in mind the old field name will still appear when using the web-based lead loader. The main page displays the Label ID, Name, Active status, Admin Group, and Modify link.

### ***Add a New Screen Label***

You can add a Screen Label template by selecting the link at the top of the page. You'll be prompted for complete the following.

**Label ID** - This field needs to be at least 2 characters in length and no more than 20 characters in length, no spaces or special characters. This is the ID that will be used to identify the screen label throughout the system.

**Label Name** - This is the descriptive name of the screen label entry.

**Active** - Set whether the screen label is active or not.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this Screen Label record restricted by user group. Default is --ALL-- which allows any admin user to view this Screen Label record.

Click “submit” and you'll see the expanded screen showing each field that can be edited: *Label Title, Label First Name, Label Middle Initial, Label Last Name, Label Address1, Label Address2, Label Address3, Label City, Label State, Label Province, Label Postal Code, Label Vendor Lead Code, Label Gender, Label Phone Number, Label Phone Code, Label Alt Phone, Label Security Phrase, Label Email, Label Comments.*

**Hide Label in Call Logs** - If a label is set to ---HIDE--- then the agent call logs, if enabled on the campaign, will still show the field and data unless this option is set to Y. Default is

**Field Labels** -These 19 fields allow you to set the name as it will appear in the agent interface as well as the administrative modify lead page. Default is empty which will use the hard-coded defaults in the agent interface. You can also set a label to ---HIDE--- to hide both the label and the field. Another option for most fields is ---READONLY--- which will display but not allow an agent to modify the field. One more option for most fields is ---REQUIRED--- which will force an agent to populate that field on all calls before being able to hang up and disposition each call. For the REQUIRED option to work, the campaign must have Allow Required Fields enabled.

**Campaigns Using This Screen Label** – Displays all campaigns that currently have this Screen Label active.

COLORS ID	Name	Active	Menu Colors
<a href="#">alt_green</a>	alternate green	Y	
<a href="#">basic_orange</a>	basic orange	Y	
<a href="#">basic_purple</a>	basic purple	Y	
<a href="#">basic_red</a>	basic red	Y	
<a href="#">basic_yellow</a>	basic yellow	Y	
<a href="#">default_blue_test</a>	default blue test	Y	
<a href="#">default_grey_agent</a>	default grey agent	Y	
<a href="#">pale_green</a>	pale green	Y	
<a href="#">red_rust</a>	dark red rust	Y	

**Figure 45. Screen Colors**

## ADMIN – SCREEN COLORS

Screen colors give you the option of using a different color scheme and logo for your admin and agent screens. It is assigned in the System Settings modification page. Each Screen Colors template will be listed in pull-down menus named “Admin Screen Colors”, “Agent Screen Colors” and “Chat Screen Colors”.

### **Add a New Screen Color**

You can add a Screen Color by selecting the link at the top of the page. The following fields are within the Screen Colors screen.

**Colors ID** -This field needs to be at least 2 characters in length and no more than 20 characters in length, no spaces or special characters. This is the ID that will be used to identify the screen colors in the system.

**Colors Name** -This is the descriptive name of the screen colors entry.

**Active** - Set whether the screen color set is active or not.

**Admin User Group** -This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this record.



**Menu Background** -This is where you set the hex color value for the sidebar menu background. It must be a darker color since white text will be displayed on top of it. Default is 015B91.

**Frame Background** -This is where you set the hex color value for the frame main background. It must be a light color since black text will be displayed on top of it. Default is D9E6FE.

**Standard Row Backgrounds** -This is where you set the hex color values for the several standard row backgrounds. They should be lighter colors since black text will be displayed on top of them. These are often used to make different sections stand apart or as alternating colors for rows. Defaults are 9BB9FB, B9CBFD, 8EBCFD, B6D3FC, A3C3D6. The Standard Row 5 Background is used in the Agent screen for the background color behind the logo after the agent has logged in.

**Alternate Row Backgrounds** -This is where you set the hex color values for the several alternate row backgrounds. They should be lighter colors since black text will be displayed on top of them. These are used to differentiate sections from the Standard backgrounds defined above. Defaults are BDFFB, 99FF99, CCFFCC.

**Web Logo** -This is where you can select a custom image file for your logo. The standard size for a logo image is 170 pixels wide and 45 pixels high. We suggest using the PNG format, but GIF and JPG will work as well. To have a custom logo image show up in this list, it needs to be uploaded to your webserver in the images directory, and the filename needs to begin with “dialer\_admin\_web\_logo”. For example, if you upload the image file “dialer\_admin\_web\_logoSAMPLE.png”, it will show up in the select list as “SAMPLE.png”. Default is default\_new for the new PNG logo image file.

LANGUAGE ID	Description	Code	ACT	ADMIN GROUP	MODIFY DATE	PHRASES	MODIFY
new_spanish	Spanish 2019	es	N	---ALL---	2019-03-18 21:20:27	8210(8210/0)	<a href="#">MODIFY</a>

runtime: 1 seconds    Version: 2.14-11    Build: 170409-1547

**Figure 46. Languages Listings**

## ADMIN – LANGUAGES

The Languages feature gives you the option of using a different set of phrases for your admin and agent web screens. A user's selected Language can be changed in a few places, from the link at the top of the page on the admin screen, as well as the User Modify page. On the Agent screen, the agents can also be given the option to choose the language they want to use when they log in. You can also use Languages to just make small changes in phrasing in the admin and/or agent screens, and any phrases you do not alter will just use the default English phrases.

### **Add a New Language**

You can add a Language by selecting the link at the top of the page. The following fields and features are within the Languages screen.

**Language ID** - The unique ID that the language will be referred to in the system. it should contain no spaces or special characters other than underscores or dashes.

**Language Description** - Description of the language entry.

**Language Code** - The web browser code to be used to identify the native web browser language that this language is intended for. For example, United States English is en-us. This is not a required field. If a two letter code is used and a matching image is found, it will be displayed next to this field.

**Admin User Group** - Administrative User Group associated with this language entry.

**Active** - For Agents and Users to use this language, this needs to be set to Y. Default is N.

**English Text** - The text as it appears in the web screens in English. Every phrase in Languages keys on the English phrases that are hard-coded into the Agent and Admin screens.

**Populate Language** - This option will populate the new Language with all of the phrases that were gathered while parsing through the web pages. Setting this to AGENT will populate only the agent screen phrases. Setting this to ADMIN will populate only the administration screen phrases. Setting this to ALL will populate all gathered phrases. Default is Leave Empty.

**Import Action** - The Only Add Missing Phrases option will not modify any existing phrase translations, it will only add phrases that are missing. The Only Update Existing Phrases option will not add any new phrases, it will only update the translations of matching phrases. The Add and Update Phrases option will both add missing phrases and update existing phrases. Default is Only Add Missing Phrases.

**Import Data** - One phrase per line, English text then a pipe then translated text.

**Export Action** - The Only NOT Translated Phrases option will only export phrases that have no translated phrase. The Only Translated Phrases option will only export phrases that have no translated phrase. The All Phrases option will export all phrases for the selected Language. Default is Only NOT Translated Phrases.

**Additional Languages** – There are additional languages available on the project website for download at the following link:

<http://www.dialer.org/translations/>

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**AGENT AUDIO SOUNDBOARD LISTINGS:**

Soundboard ID	Soundboard Name	Active	Layout	API User	ADMIN GROUP	MODIFY
customer_order_test	Outbound Customers Soundboard	Y	columns01	6666	---ALL---	MODIFY

runtime: 0 seconds    Version: 2.14-13    Build: 180503-2215

**Figure 47. Agent Audio Soundboard Listings**

## ADMIN – AGENT AUDIO SOUNDBOARDS

Audio Soundboards can allow a human agent to just play a few selected audio recordings, like legal or contractual disclaimers, or they can replace an agent speaking to the customer entirely in much more complex audio soundboard setups. We have tested the Agent Soundboard control screen in Dialer with over 100 audio recording buttons successfully, and the system is capable of handling many more than that.

### **Add a New Agent Audio Soundboard**

You can add an Agent Audio Soundboard by selecting the link at the top of the page. The following fields and features are within the Agent Audio Soundboards screen.

**Soundboard ID** - The unique ID of the soundboard, must contain no spaces or special characters other than letters numbers dashes or underscores. This is the ID that will be used within the Script that you will create for this Soundboard to link it to this soundboard entry.

**Soundboard Name** - The name of the soundboard, will be displayed to the agent at the top of the Soundboard control screen.

**Soundboard Notes** - For administrative notes only, not displayed to agents.

**Soundboard API User** - The system user that will trigger the soundboard audio events, must be a valid user in the system with permission to use the API. We usually recommend using a separate API user that has reduced permissions for this purpose.

**Soundboard API Pass** - The password for the system user that will trigger the soundboard audio events.

**Active** - For this soundboard to be used by agents, it must be set to Active Y. Default is Y.

**Audio Functions** - The list of audio functions that you want the soundboard to allow the agents to perform, separated by dashes. Currently non-functional. Default is PLAY-STOP-RESTART.

**Audio Display** - What you want to show up to the agents on the buttons to play the audio, separated by dashes. FILE will display the filename of the audio file. NAME will display the Soundboard Name. HIDENUMBERS will not show the number of each button on the agent screen. You can choose any of these or all together. Default is FILE-NAME.

**Layout** - The layout of the agent soundboard. The -default- layout is designed to build from the top down, filling the agent script frame. The -columns- layout is designed to use separated columns of buttons. Default is default. If you are using a -columns- layout, you can also set the maximum number of columns per row section with the Columns Limit setting

**User Group** - Administrative User Group associated with this soundboard.

**Audio Filename** - Filename of the audio file you want to play, without a file extension. Must be present in the Audio Store to work properly. Can be displayed to the agent on the audio buttons if FILE is in the Audio Display field.

**Audio Name** - Descriptive name of the audio file you want to play. Can be displayed to the agent on the audio buttons if NAME is in the Audio Display field.

**Rank** - The vertical order in which the audio file will be displayed to the agent.

**Horz** - The horizontal order in which the audio file will be displayed to the agent.

**Type** - Either a clickable button that will play a sound, a header that will not be clickable and will only show the NAME of the entry or a space that will leave a blank spacer with no text. The header will also have white text on a black background. The -head2r- option is a header that will extend into the second row of columns below it.

**Font** - The font the button will be displayed with, the bigger the number, the bigger the font. A -B- in the option will bold the text. An -I- in the option will italicize the text.

**Level** - Primary or secondary level of the audio. Level 2 audio files are always below a level 1 audio file.

**Add** - Put a new audio file on the primary level 1 or underneath a level 1 in the secondary level 2 position.

**Script Example** – This is what you put into a script that you will need to create to be able to use this Agent Soundboard. Be sure to replace the soundboard\_id shown below with your own soundboard\_id:

```
<iframe src="/vdc_soundboard_display.php?user=-A--user--B--&pass=-A--pass--B--&bcrypt=OFF&soundboard_id=customer_order_test" style="background-color:transparent;" scrolling="auto" frameborder="0" allowtransparency="true" width="100%" height="500"> </iframe>
```

Example screen is shown below, example SQL to insert this into your system appears on the next page.

### Outbound Customers Soundboard

**stop audio**

OPENING		ASK FOR ORDER	REBUTTALS	Q and A
Hello	MAAM - OPEN	YES REORDER	Wants Mail Only	800 number
Good Morning	MAAM - REPEAT	FULL PLAN	Husband - Wife Do It	Supplies needed
Good Evening	MAAM - SHORT	BASIC PLAN	How Does This Work	I am in Training
Good Afternoon		ONE-TIME-ONLY	How Much Time	QUICK LEAVE
INBOUND CALL	SIR - OPEN	SAMPLE PAK	NAME OF GROUP	Supported Programs
FIND ADULT	SIR - REPEAT	FINAL ASK - TRIAL	Did This Already	Order Status
Wrong person	SIR - SHORT	INFOPIECE ASK	Gave to Different	STATE - NATION
RESCHEDULE		YES TO INFOPIECE	Count on Your Support	Return question
CALL ME BACK	WHO ARE YOU?			Who is this?
	Using Computer			Where are you located?
				Company name
				Website
				President
				How did you get my #
				Org Location

HOTKEYS		FINAL
Uh-huh	I am glad to hear that	I am sorry
Okay	Great	I understand
Repeat that	Laughing	Hold on Just 1 sec
Thank you	No Problem	No

**Figure 48. Example Agent Audio Soundboard setup**

## Agent Audio Soundboard example SQL:

```
INSERT INTO
`dialer_avatars` (avatar_id,avatar_name,avatar_notes,avatar_api_user,active,audio_functions,user_group,audio_display,
avatar_api_pass,soundboard_layout,columns_limit) VALUES ('customer_order_test','Outbound Customers
Soundboard','','6666','Y','PLAY-STOP-RESTART','---ALL---','NAME-HIDENUMBERS','1234','columns01',5);

INSERT INTO
`dialer_avatar_audio` (avatar_id,audio_filename,audio_name,rank,level,parent_audio_filename,parent_rank,h_ord,button
type,font_size) VALUES ('customer_order_test','column1','OPENING',1,1,'','',1,'header','2B'),
('customer_order_test','column2','OPENING 2',2,1,'','',1,'space','2B'), ('customer_order_test','column3','ASK FOR
ORDER',3,1,'','',1,'header','2B'), ('customer_order_test','column4','REBUTTALS',4,1,'','',1,'header','2B'),
('customer_order_test','column5','Q and A',5,1,'','',1,'head2r','2B'),
('customer_order_test','ding','Hello',1,2,'button','2'), ('customer_order_test','buzz','Good
Morning',2,2,'column1','1',1,'button','2'), ('customer_order_test','beep','Good
Evening',3,2,'column1','1',1,'button','2'), ('customer_order_test','crash','Good
Afternoon',4,2,'column2','1',1,'button','2'), ('customer_order_test','feet','INBOUND
CALL',5,2,'column1','1',1,'button','2'), ('customer_order_test','snow','FIND ADULT',6,2,'column1','1',1,'button','2'),
('customer_order_test','clear','Wrong person',7,2,'column1','1',1,'button','2'),
('customer_order_test','bits','RESCHEDULE',8,2,'column1','1',1,'button','2'), ('customer_order_test','fast','CALL ME
BACK',9,2,'column1','1',1,'button','2'), ('customer_order_test','ding','MAAM - OPEN',1,2,'column2','2',1,'button','2'),
('customer_order_test','buzz','MAAM - REPEAT',2,2,'column2','2',1,'button','2'), ('customer_order_test','feet','MAAM -
SHORT',3,2,'column2','2',1,'button','2'), ('customer_order_test','snow','x',4,2,'column2','2',1,'space','2'),
('customer_order_test','clear','SIR - OPEN',5,2,'column2','2',1,'button','2'),
('customer_order_test','column_b2','HOTKEYS',7,1,'','',1,'header','2B'), ('customer_order_test','fast','SIR -
REPEAT',6,2,'column2','2',1,'button','2'), ('customer_order_test','call','SIR -
SHORT',7,2,'column2','2',1,'button','2'), ('customer_order_test','ping','x',8,2,'column2','2',1,'space','2'),
('customer_order_test','up','WHO ARE YOU?',9,2,'column2','2',1,'button','2'), ('customer_order_test','pop','Using
Computer',10,2,'column2','2',1,'button','2'), ('customer_order_test','column_b1','',6,1,'','',1,'space','2B'),
('customer_order_test','column_b3','',8,1,'','',1,'space','2B'),
('customer_order_test','column_b4','FINAL',9,1,'','',1,'header','2B'), ('customer_order_test','snow','YES
REORDER',1,2,'column3','3',1,'button','2'), ('customer_order_test','ping','FULL
PLAN',2,2,'column3','3',1,'button','2'), ('customer_order_test','up','BASIC PLAN',3,2,'column3','3',1,'button','2'),
('customer_order_test','ding','ONE-TIME-ONLY',4,2,'column3','3',1,'button','2'), ('customer_order_test','buzz','SAMPLE
PAK',5,2,'column3','3',1,'button','2'), ('customer_order_test','fast','FINAL ASK -
TRIAL',6,2,'column3','3',1,'button','2'), ('customer_order_test','clear','INFOPIECE
ASK',7,2,'column3','3',1,'button','2'), ('customer_order_test','feet','YES TO
INFOPIECE',8,2,'column3','3',1,'button','2'), ('customer_order_test','snow','Wants Mail
Only',1,2,'column4','4',1,'button','2'), ('customer_order_test','fast','Husband - Wife Do
It',2,2,'column4','4',1,'button','2'), ('customer_order_test','clear','How Does This
Work',3,2,'column4','4',1,'button','2'), ('customer_order_test','buzz','How Much
Time',4,2,'column4','4',1,'button','2'), ('customer_order_test','feet','NAME OF
GROUP',5,2,'column4','4',1,'button','2'), ('customer_order_test','ping','Did This
Already',6,2,'column4','4',1,'button','2'), ('customer_order_test','ding','Gave to
Different',7,2,'column4','4',1,'button','2'), ('customer_order_test','up','Count on Your
Support',8,2,'column4','4',1,'button','2'), ('customer_order_test','ping','800
number',1,2,'column5','5',1,'button','2'), ('customer_order_test','snow','Supplies
needed',2,2,'column5','5',1,'button','2'), ('customer_order_test','fast','I am in
Training',3,2,'column5','5',1,'button','2'), ('customer_order_test','up','QUICK
LEAVE',4,2,'column5','5',1,'button','2'), ('customer_order_test','clear','Supported
Programs',5,2,'column5','5',1,'button','2'), ('customer_order_test','feet','Order
Status',6,2,'column5','5',1,'button','2'), ('customer_order_test','pop','STATE -
NATION',7,2,'column5','5',1,'button','2'), ('customer_order_test','late','Return
question',8,2,'column5','5',1,'button','2'), ('customer_order_test','high','Who is
this?',9,2,'column5','5',1,'button','2'), ('customer_order_test','or','Where are you
located?',10,2,'column5','5',1,'button','2'), ('customer_order_test','ping','Uh-
huh',1,2,'column_b1','6',1,'button','2'), ('customer_order_test','pop','Okay',2,2,'column_b1','6',1,'button','2'),
('customer_order_test','buzz','Repeat that',3,2,'column_b1','6',1,'button','2'), ('customer_order_test','ding','Thank
you',4,2,'column_b1','6',1,'button','2'), ('customer_order_test','ping','I am glad to hear
that',1,2,'column_b2','7',1,'button','2'), ('customer_order_test','pop','Great',2,2,'column_b2','7',1,'button','2'),
('customer_order_test','buzz','Laughing',3,2,'column_b2','7',1,'button','2'), ('customer_order_test','ding','No
Problem',4,2,'column_b2','7',1,'button','2'), ('customer_order_test','ping','I am
sorry',1,2,'column_b3','8',1,'button','2'), ('customer_order_test','pop','I
understand',2,2,'column_b3','8',1,'button','2'), ('customer_order_test','buzz','Hold on Just 1
sec',3,2,'column_b3','8',1,'button','2'), ('customer_order_test','ding','No',4,2,'column_b3','8',1,'button','2'),
('customer_order_test','ping','Are you 100% sure?',1,2,'column_b4','9',1,'button','2'),
('customer_order_test','pop','Add to DNC list',2,2,'column_b4','9',1,'button','2'),
('customer_order_test','buzz','Transfer to Verification',3,2,'column_b4','9',1,'button','2'),
('customer_order_test','ding','(Please hold on)',4,2,'column_b4','9',1,'button','2'),
('customer_order_test','up','(EXIT CALL)',5,2,'column_b4','9',1,'button','2'), ('customer_order_test','bar','Company
name',11,2,'column5','5',1,'button','2'), ('customer_order_test','bits','Website',12,2,'column5','5',1,'button','2'),
('customer_order_test','shop','President',13,2,'column5','5',1,'button','2'), ('customer_order_test','male','How did
you get my #',14,2,'column5','5',1,'button','2'), ('customer_order_test','speed','Org
Location',15,2,'column5','5',1,'button','2');
```

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  - Screen Colors
  - System Statuses
  - Status Groups
  - VoiceMail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers

**CallCard Summary:**

STATUS	COUNT
GENERATE	10000
ACTIVE	1

There are 1001 batches in the system

Last 10 Calls:

#	CARD ID	DATE	CallerID	DID	START MIN	TALK MIN	AGENT	AGENT DATE	DISPO
0		2010-07-05 12:17:25	7275551212		0	0			
1		2010-07-05 12:11:15	7275551212		0	0			
2		2010-07-05 12:10:24	7275551212		0	0			
3		2010-07-05 11:57:33	7275551212		0	0			
4		2010-07-05 11:56:37	7275551212		0	0			
5	100-00002-10011	2010-03-12 12:02:45	7275551212	7275553332	1	1	6666	2010-03-12 12:03:10	WN
6	100-00002-10011	2010-03-12 10:41:02	7275551212	7275553332	2	1	6666	2010-03-12 10:41:39	DEC
7	100-00002-10011	2010-03-12 10:03:42	7275551212	7275553332	3	1	6666	2010-03-12 10:04:21	NP
8	100-00002-10011	2010-03-12 10:02:13	7275551212	7275553332	1	1	6666	2010-03-12 10:02:33	NI
9	100-00002-10011	2010-03-12 08:55:05	7275551212	7275553331	2	1	6666	2010-03-12 08:55:27	NI

CallCard VERSION: 2.12-11 BUILD: 160330-1551

Figure 49. CallCard Admin

## ADMIN – CALLCARD ADMIN

CallCard feature allows you to create CallCard Ids in the system with a predetermined number of minutes. The CallCard Ids are issued to your customers, and when they call in, the talk time on the phone with the agent is deducted from from the card. It allows you to easily track & assess the agents time to the customer. There are several applications for this including: paid support queues, chat lines, advisor services, financial advice, legal services. The system consists of an AGI script that takes calls in, asks for and validates the pin/status/balance and sends them to a defined in-group, then the deduction of time from the customer's account starts once the agent receives the call. Also, there will be an option for an alert to low balance injected into the calling session. This currently exists as framework in Dialer . While this allows for variety of customization options, it also requires knowledgeable Dialer support to implement. (See our CallCard document at: <http://dialer.org/docs/CALLCARD.txt> )

AGI Script involved in call card feature:  
agi-CALLCARD\_dial\_in.agi

Web scripts involved:  
callcard\_admin.php, callcard\_export\_report.php



NAME	Office Number	BU Name	Department	Group	Job Title	Location	MODIFY
Test Contact	1234	ACME Inc.	Sales	External	Sales Agent	Chicago	<a href="#">MODIFY</a>

**Figure 50. Contacts**

## ADMIN – Contacts

Contacts allows you to add modify or delete contacts in the system that can be used as part of a Custom Transfer in a campaign where an agent can search for contacts by first name last name or office number and then select one of many numbers associated with that contact. This feature allows easy searching and transferring of calls to predefined non-agent phone numbers, is geared toward receptionists/operators. The “Enable Contacts” field (in the Admin section, on the System Settings page) must first be set to 1 to activate. Set “Custom Transfer” to VIEW\_CONTACTS and “Enable Transfer Presets” (in the campaign modification page) set to CONTACTS. This can be disabled on a per agent basis, by setting “Preset Contact Search” to DISABLED. There is also a framework in place that can optionally point to a contact table in any other MySQL (by using the Alt Log settings in System Settings), as long as they share the same schema. This framework will require good knowledge of MySQL to configure properly, so we recommend seeking qualified assistance to implement it.

### **Add a New Contact**

Select the “Add A Contact” link at the top of the page to create a new Contact record. You will be prompted to complete the following:

*First Name, Last Name, Office Number, Cell Number, Other Number 1, Other Number 2, BU Name, Department, Group, Job Title, Location*

Click “submit” to save your changes.

Container ID	Notes	Type	Length	ADMIN GROUP	MODIFY
ccc_test	Cross-cluster connection lead lookup URL test	AGI	133	--ALL--	MODIFY
state_redirect_east_west	Call Menu AGI call routing east and west coast	AGI	416	--ALL--	MODIFY
AMD_AGENT_OPT_TEST3	AMD agent options for TEST3 campaign	AMD_AGENT_OPTIONS	0	--ALL--	MODIFY
AMD_AGENT_OPT_TESTCAMP	AMD agent options for TESTCAMP campaign	AMD_AGENT_OPTIONS	0	--ALL--	MODIFY
test_call_quota	Testing call quota lead ranking container	CALL_QUOTA	400	--ALL--	MODIFY
test_dial_timeouts	Testing dial timeouts	DIAL_TIMEOUTS	101	--ALL--	MODIFY
DISPO_FILTER_TEST	This is for Dispo Call URL Filtering	DISPO_FILTER	112	--ALL--	MODIFY
MIKECONTAINER	Stuff	EMAIL_TEMPLATE	0	--ALL--	MODIFY
test_container	this is a test container	EMAIL_TEMPLATE	2760	--ALL--	MODIFY
TEST_DEAD_EMAIL	Dead email URL test container	EMAIL_TEMPLATE	400	--ALL--	MODIFY
inbound_noagent_nodial_group1	Inbound no-agent no-dial group 1	INGROUP_LIST	37	--ALL--	MODIFY
AGENT_CALLBACK_EMAIL	Scheduled callback email alert settings	OTHER	536	--ALL--	MODIFY
agent_debug_purge	purge of agent debug log after X days	OTHER	105	--ALL--	MODIFY
API_LOG_URL_COLUMNS	List of custom variables to include from API log report	OTHER	203	--ALL--	MODIFY
API_LOG_URL_COLUMNS1	List of custom variables to include from API log report	OTHER	259	--ALL--	MODIFY
Callback_LIVE_plus_one_day	adds 24 hours to callback dates of live callbacks	OTHER	135	--ALL--	MODIFY
DNCDOTCOM	Dnc dot com integration settings	OTHER	8213	--ALL--	MODIFY
EDU_MAIN_OLD_LEAD_ARCHIVE	archive of old leads in a campaign lists	OTHER	869	--ALL--	MODIFY
export_calls_report_test	Daily Export Calls Report	OTHER	0	--ALL--	MODIFY
KHOMPSETTINGS	Global Settings For KHOMP	OTHER	759	--ALL--	MODIFY
KHOMPSTATUSMAP	Map of Khomps return values to Vicidials statuses	OTHER	16581	--ALL--	MODIFY
SQL_test_1	testing running sql in a container	OTHER	239	--ALL--	MODIFY
TCPALITIGATORLIST	For use with inbound DID scrubbing	OTHER	442	--ALL--	MODIFY
test		OTHER	0	--ALL--	MODIFY
test_cm_url	testing CallMenu URL	OTHER	286	--ALL--	MODIFY
Test_container4	this is a test container 4	OTHER	39	--ALL--	MODIFY
UPDATE_CAMPAIGN_DIALLEVEL	UPdates dial leve	OTHER	96	--ALL--	MODIFY
DIAL800_XML_test	testing DIAL800 XML transfers	PERL_CLI	311	--ALL--	MODIFY
email_agents_waiting	email agents waiting script settings	PERL_CLI	111	--ALL--	MODIFY
LIST_EXPORTER	Settings for list export-deletion script	PERL_CLI	263	--ALL--	MODIFY
Test_container3	this is a test container 3 update	READ_ONLY	52	--ALL--	MODIFY
test_readonly	test read only container	READ_ONLY	0	--ALL--	MODIFY
sip_event_actions_test	Test SIP event actions	SIP_EVENT_ACTIONS	184	--ALL--	MODIFY
TIMEZONES_AUSTRALIA	Australian Timezone List	TIMEZONE_LIST	194	--ALL--	MODIFY
TIMEZONES_BIGLIST	list of many timezones	TIMEZONE_LIST	590	--ALL--	MODIFY
TIMEZONES_CANADA	Canadian Timezone List	TIMEZONE_LIST	208	--ALL--	MODIFY
TIMEZONES_USA	USA Timezone List	TIMEZONE_LIST	225	--ALL--	MODIFY

Figure 51. Settings Containers Listings

## ADMIN – Settings Containers

Settings Containers allow for an easy and flexible way to add, modify and delete large configurations of settings, or for elements like email templates to be used by PHP and Perl scripts within the codebase. There are a few scripts that use Settings Containers already, including the `dispo_send_email.php` script and the `AST_settings_container_SQL.pl` back-end script.

**Container ID** -This field needs to be at least 2 characters in length and no more than 40 characters in length, no spaces or special characters. This is the ID that will be used to identify the Settings Container throughout the system.

**Container Notes** -This is the descriptive name of the Settings Container entry.

**Container Type** -This is the type of Container entry. This is used primarily for categorization and to show only certain containers in certain places. There is also a special container type `-READ_ONLY-` that is used and updated by external processes that cannot have the container entry modified within the admin screens. Default is `OTHER`.

**Admin User Group** -This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is `--ALL--` which allows any admin user to view this record.

**Container Entry** -This is where you put the contents of the settings that you want in this container.

**Here is an example of a Container Entry that can be used by the `dispo_send_email.php` script:**

```
; destination email
email_to => testing@acme.com

; sending email address
email_from => sales@acme.com

; subject of the email
email_subject => Order confirmation --A--vendor_lead_code--B--

; format as HTML
email_body_html

; use UTF-8 charset
email_body_utf8

; body of the email
email_body_begin =>
Hello --A--first_name--B--,

This email is to welcome you to the wonderful ACME product-of-the-
month club!

You spoke to agent --A--fullname--B--.

Here is a summary of your account information:

account ID: --A--vendor_lead_code--B--
phone_number: --A--phone_number--B--
title: --A--title--B--
first_name: --A--first_name--B--
middle_initial: --A--middle_initial--B--
last_name: --A--last_name--B--
address1: --A--address1--B--
address2: --A--address2--B--
address3: --A--address3--B--
city: --A--city--B--
state: --A--state--B--
province: --A--province--B--
postal_code: --A--postal_code--B--
country_code: --A--country_code--B--

We hope you enjoy your stuff, and happy roadrunner hunting!

ACME Support Department
312-555-1212

email_body_end
```

**Here is an example Container entry that can be used for a Campaign “Inbound No-Agents No-Dial”:**

```
TEST_IN
TEST_IN2
TEST_IN3
```

**Here is an example Container entry that can be used for Scheduled Callbacks Timezone list:**

```
USA,AST,N,Atlantic Time Zone
USA,EST,Y,Eastern Time Zone
USA,CST,Y,Central Time Zone
USA,MST,Y,Mountain Time Zone
USA,MST,N,Arizona Time Zone
USA,PST,Y,Pacific Time Zone
USA,AKST,Y,Alaska Time Zone
USA,HST,N,Hawaii Time Zone
```

**Here is an example Container entry that can be used for per-lead Dial Timeouts:**

```
manual_dial_field => source_id
auto_dial_field => source_id
A => 100
B => 80
C => 110
```

**Here is an example of a container that can be used for Agent AMD options:**

```
HUMAN, HUMAN
NOTSURE, TOOLONG
MACHINE, INITIALSILENCE
```

**Here is an example of a container for Two-Factor Authentication:**

```
auth_code_expire_minutes => 30
auth_code_attempts => 5
auth_code_length => 6
email_auth => YES
email_from => no-reply@dialer.org
email_subject => Dialer Login Authentication
email_message => Your Dialer Login Authorization Code: --A--auth_code--B--
phone_auth => YES
phone_prefix => 91
phone_server_ip => 192.168.198.5
phone_cid_number => 8635551212
phone_message_override =>
sms_auth => YES
sms_cid_number => 3125551212
```

```
sms_url => https://http-api.d7networks.com/send?to=1--A--mobile_number--B--
&from=13125551212&username=USERHERE&password=PASSHERE&content=Here%20is%20your
%20Dialer %20login%20authorization%20code%3A%20--A--auth_code--B--
```

**Here is an example of a container that can be used for Dispo Filtering:**

```
first_name,test,TESTING
first_name,Test,TESTING
last_name,,MCARE
email,,noemail@aol.com
```

**Here is an example of a container that can be used for Pause Code Filtering:**

```
BREAK
TRAIN
WATER
```

**Here is an example of a container that can be used for Pause Code Filtering:**

```
BREAK
TRAIN
WATER
```

**Here is an example of a container that can be used for Phone Defaults:**

```
# Below are all phone settings recognized under the PHONE_DEFAULTS
# container type and the type of data each accepts. Any setting that
# uses a default value in the database has said value pre-set below

# 10 char max
voicemail_id =>

# 15 char max
server_ip =>

# 100 char max
pass =>

# 10 char max
status =>

# Y/N only
active => Y

# 50 char max
phone_type =>

# 'SIP','Zap','IAX2' or 'EXTERNAL'
protocol => SIP

# positive or negatier 2-decimal floating point number
local_gmt => -5.00
```

```
# 20 char max
voicemail_dump_exten => 8502666666666666

# 20 char max
outbound_cid =>

# 100 char max
email =>

# 15 char max
template_id =>

# text, conf_override can span multiple lines, see below
conf_override =>
# type=friend
# host=dynamic
# canreinvite=no
# context=default1

# 50 char max
phone_context => default

# Unsigned - max value 65536
phone_ring_timeout => 60

# 20 char max
conf_secret => test

# Y/N only
delete_vm_after_email => N

# Options - Y, N, or Y_API_LAUNCH
is_webphone => N

# Y/N only
use_external_server_ip => N

# 100 char max
codecs_list =>

# 0/1 only
codecs_with_template => 0

# Options - Y, N, TOGGLE, or TOGGLE_OFF
webphone_dialpad => Y

# Y/N only
on_hook_agent => N

# Y/N only
webphone_auto_answer => Y

# 30 char max
voicemail_timezone => eastern

# 255 char max
voicemail_options =>

# 20 char max
```

```
user_group => ---ALL---

# 100 char max
voicemail_greeting =>

# 20 char max
voicemail_dump_exten_no_inst => 85026666666667

# Y/N only
voicemail_instructions => Y

# Y/N only
on_login_report => N

# 40 char max
unavail_dialplan_fwd_exten =>

# 100 char max
unavail_dialplan_fwd_context =>

# text
nva_call_url =>

# 40 char max
nva_search_method =>

# 255 char max
nva_error_filename =>

# Integer, any size
nva_new_list_id => 995

# 10 char max
nva_new_phone_code => 1

# 6 char max
nva_new_status => NVAINS

# Y/N only
webphone_dialbox => Y

# Y/N only
webphone_mute => Y

# Y/N only
webphone_volume => Y

# Y/N only
webphone_debug => N

# 20 char max
outbound_alt_cid =>

# Y/N only
conf_qualify => Y

# 255 char max
webphone_layout =>
```

Auto Report ID	Name	Type	Active	ADMIN GROUP	Last Run	Length	Server	MODIFY
test_inbound_auto_report	Test inbound Auto Report	EMAIL	N	--ALL--	0	0	active_voicemail_server	MODIFY

**Figure 52. Automated Reports Listings**

## ADMIN – Automated Reports

Automated Reports allow for you to generate any of the web-based reports on a scheduled basis and have the results Emailed to recipients or uploaded to an FTP server.

**Report ID** -This is the unique identifier of this Automated Report entry. This ID cannot have any punctuation aside from underscores.

**Last Run Time** – This is the last date and time that this automated report was run.

**Report Name** - This is the descriptive name of the Automated Report entry.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user with Modify Automated Reports permissions to view this record.

**Report Server** - This is the machine that you want to use to run this automated report. You must choose a server that runs the keepalive process every minute in the crontab. The default is to use the active voicemail server as defined in System Settings.

**Report Times** - This is the list of times in HHMM format when you want the automated report to run. You can specify multiple times by separating them with a dash, like how the List Reset Times feature works.

**Report Weekdays** - This is the list of days of the week when you want the automated report to run. Either this option or the Month Days field below must be set for the report to run automatically.

**Report Month Days** - This is the list of days of the month in DD format when you want the automated report to run. You can specify multiple month days by separating them with a dash. Either this option



or the Weekdays field above must be set for the report to run automatically.

**Report Destination** - This option will determine how you want the automated report to be delivered, by EMAIL or FTP. Depending on the destination you choose, you must fill in the configuration fields below for it to work properly. Default is EMAIL.

**Email From** - If the EMAIL destination is chosen above, then this field must be filled in with the email address that you want the automated report email to come from. Note: some email servers may require certain registered email address to be used for delivery to be accepted by them. You may also have to set up a reverse domain name lookup with your network provider for the server you have chosen to send emails from.

**Email To** - If the EMAIL destination is chosen above, then this field must be filled in with the email address that you want to receive the automated report email. You can define more than one email address by separating them with a colon.

**Email Subject** - If the EMAIL destination is chosen above, then this field must be filled in with the subject of the email. As an option, you can use the --A--date--B-- or --A--datetime--B-- flag in this field to populate the current date or date-time.

**FTP Server** - If the FTP destination is chosen above, then this field must be filled in with the FTP server address. If you would like to use an SFTP or FTP over SSL server, then you will need to have your administrator confirm that your system has the proper modules installed to connect to them. If you want to connect to an SFTP server, you will need to create a Settings Container with the connection options for it, and put that Container ID in this field with SFTPCNTR before it, so if you have an SFTP Settings Container with an ID of test\_send, then you would put SFTPCNTRtest\_send in this field. For FTP over SSL you would follow very similar instructions except you need to use FTPSCNTR as your prefix. A basic settings container entry for an SFTP server might look like this

```
--ftp-server=192.168.1.3
```

```
--ftp-login=reports
```

```
--ftp-pass=reportpass
```

```
--ftp-port=22
```

```
--ftp-dir=/home/reports
```

For an FTP over SSL server you may also need to define Explicit or Implicit encryption -

```
--ftp-encrypt=E
```

**FTP User** - If the FTP destination is chosen above, then this field must be filled in with the FTP login user.

**FTP Pass** - If the FTP destination is chosen above, then this field must be filled in with the FTP login password.

**FTP Directory** - If the FTP destination is chosen above, then this field can be filled in with the FTP folder directory that you want the automated reports to be uploaded into. Note: the folder must already exist, this process will not try to create the folder.

**Filename Override** - By default, the reports will be saved as files and either emailed or sent by FTP to the selected destination, and the filenames used for those files are automatically generated with unique

generic names based upon the report ID. If you would like to override those unique generic names, you can do so by using this field. You can also use the variables shown below in the Report URL field so that you can put dates into the filename. You can also use --A--filedatetime--B-- as a variable to note the date and time the report was generated, which is useful if you will be running a report more than once a day. Only letters, numbers dashes and underscore characters are allowed in this field. Also, you should not include a file extension as part of the filename override, since the type of report will dictate the file extension that is used. Default is empty for disabled.

**Active** - The automated report will only run on the set schedule above if active is set to Y. Default is N.

**Run Now Trigger** - This option offers a way to test this automated report process before setting it to active. It can take up to one minute for the process to start running after submitting this page with this field set to Y. Default is N.

**Report URL** - This is the field where you will put the full web address, or URL, for the report that you want to run. The easiest way to figure out what address to use is to run the report normally, then go to the Reports, Admin Utilities, Admin Report Log Viewer to see the full URL that was used to run that report. Once you have copied that URL, you can replace the dates that you see with one of these variables in the standard format that is used within this system, for example, --A--today--B--. You can use: today, yesterday, 6days, 7days, 8days, 13days, 14days, 15days, 30days. Note: some networks may require that you use a local server address in this URL if that is the only way that a server on your network can access the webserver used for reporting. Related to this, you may also have to use a local IP address if a full domain name is not accessible from within your system network. Also, it is recommended that you run reports in TEXT format for best display results.

IP LIST ID	NAME	ACTIVE	GROUP	IPS	MODIFY
test_ip_list	Test IP List	Y	---ALL---	2	<a href="#">MODIFY</a>

Figure 53. IP List Listings

## ADMIN – IP Lists

The purpose of this feature is to allow an administrator the ability to restrict who can use the system web resources on an IP Address basis. This is designed to allow you to create IP Lists and then assign those IP Lists on a per-User-Group basis separated as Admin, Agent and API permissions. For example, you can set the IP List for Agent web access to DISABLED to allow anyone in the User Group to log in as an agent from any location, this is the default behavior. You can then set an IP List with one IP Address in it so within that same User Group, managers will only be able to log in to the admin web screens from that one location. You can also set an IP List with no entries in it for the API access IP List to not allow any user in that User Group to use the APIs.

This IP whitelisting authentication is designed to happen after user authentication in order to allow a specific user to be set to ignore the IP List blocking feature, as well as to be able to have the IP List feature work on a per-User-Group basis.

There is also a System-wide Blacklist option that allows you to specify an IP List to use to block all web service access to all users coming from the IP Addresses listed in the system settings blacklist IP List.

In order to use any of these features, the System Settings option "Allow IP Lists" must be enabled on your system. Then you will see the IP Lists Admin section appear in the Admin menu.

**IP List** -This is the unique ID of the IP List entry. This ID cannot have any punctuation aside from underscores.

**IP List Name** - This is the descriptive name of the IP List entry.

**Active** - The IP List will only be able to be enabled for a user group if active is set to Y. Default is N.

**Admin User Group** - This is the administrative user group for this record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user with Modify IP Lists permissions to view this record.

**IP Addresses** - This is the list of IP Addresses within this IP List. Only one IP Address per line is allowed. If you want to use IP whitelisting for agent access and you are using Dispo Call URL features like the `dispo_move_list.php` script, you will need to remember to include the IP Addresses of the web server in your IP List, because Dispo Call URL actions are run from the webserver.

QUEUE GROUP ID	NOTES	ACTIVE	GROUP	#	ENTRIES	MODIFY
Test_all_camps_igs	Test all campaigns and in-groups	Y	---ALL---	94	ALTTEST APPTAGNT APPTENG APPTSPA EMAIL...	<a href="#">MODIFY</a>
Test_QG	Test Queue Group 3	Y	---ALL---	15	ALTTEST APPTAGNT APPTENG APPTSPA TESTCA...	<a href="#">MODIFY</a>

Figure 54. Queue Groups Listings

## ADMIN – Queue Groups

Queue Groups are used by some reports to show stats from a group of campaigns and-or inbound groups. The ID must be from 2 to 20 characters in length with no punctuation other than an underscore allowed. The Name must be from 5 to 40 characters in length. Active will determine if the Queue Group is shown as an option in reports. For the Included Campaigns and Inbound Groups, you can select the ones that you want to be included in the Queue Group.

ADMINISTRATION	USER CALLBACK HOLD LISTINGS: 6666								
	LEAD	LIST	CAMPAIGN	ENTRY DATE	CALLBACK DATE	USER	RECIPIENT	STATUS	GROUP
	1237988	82105	TESTCAMP	2016-11-17 12:47:38	2016-11-17 12:00:00	8888	USERONLY	LIVE	ADMIN
	1139739	829	TESTCAMP	2016-11-17 12:45:21	2016-11-17 12:45:00	8888	USERONLY	LIVE	ADMIN
	1041908	223344	TESTCAMP	2015-11-19 15:52:55	2015-11-22 00:00:00	8888	ANYONE	LIVE	ADMIN
	1041908	223344	TESTCAMP	2015-11-19 16:48:19	2015-11-22 01:00:00	8888	ANYONE	LIVE	ADMIN
	1041908	223344	TESTCAMP	2015-11-19 16:49:50	2015-11-22 04:00:00	8888	ANYONE	LIVE	ADMIN
	1041908	223344	TESTCAMP	2015-11-19 19:35:16	2015-11-22 08:00:00	8888	ANYONE	LIVE	ADMIN
	1041908	223344	TESTCAMP	2015-11-19 15:52:30	2015-11-23 00:00:00	8888	ANYONE	LIVE	ADMIN
	1238039	889	TESTCAMP	2016-03-03 15:12:37	2016-03-06 00:00:00	8888	ANYONE	LIVE	ADMIN
	1041912	89106	TESTCAMP	2016-03-24 20:11:39	2016-03-24 19:00:00	8888	ANYONE	LIVE	ADMIN
	1041911	89106	TESTCAMP	2016-03-24 17:10:42	2016-03-30 00:00:00	8888	ANYONE	LIVE	ADMIN
	1041909	223344	TESTCAMP	2016-04-20 13:28:21	2016-04-20 00:00:00	8888	ANYONE	LIVE	ADMIN
	1079409	89106	TESTCAMP	2016-07-15 12:36:14	2016-07-15 00:00:00	8888	ANYONE	LIVE	ADMIN

[Remove LIVE Callbacks older than one month for this user](#)  
[Remove LIVE Callbacks older than one week for this user](#)

Figure 55. Scheduled Callbacks

## Dialer SCHEDULED CALLBACKS

Scheduled CallBacks are leads that have been defined by an Agent to be contacted again at a specific date and time in the future. There are two types of Scheduled CallBacks: ANYONE callbacks which go back into the hopper for a campaign (after their callback date and time is reached) and USERONLY callbacks which are only able to be called by the agent that set the callback. Both types of callbacks can be modified by a manager if they have permissions to do so.

Callback records can be displayed in the Dialer admin.php interface in many ways: by user, by campaign or by list. At the bottom of the user, campaign and list modification screens you will see a link that will read "Click here to see all CallBack Holds for this user" or IN THIS CAMPAIGN or LIST depending on which screen you are in. If you click on this link you will see a list of the Scheduled Callbacks with the lead, list ID, campaign, date the customer was last called, date the callback is scheduled for, the User ID of the Agent that set the callback, whether the callback is ANYONE or USERONLY and what the status of the Scheduled Callback is. If an ANYONE Callback is LIVE it will be put back in the hopper and the status will be changed to CALLBK so that it can be called quickly. If an USERONLY callback is LIVE or ACTIVE it can be called by an agent when it is convenient for them by using their Scheduled Callbacks link on their Dialer client screen.

If you want to edit a Scheduled Callback record, all you need to do is click on the lead ID in the list of Scheduled callbacks mentioned above. This will take you to the lead modification page where you can simply change the status of a lead to remove the callback record, or you can change it to an ANYONE callback if it is USERONLY, change the user ID associated with the Callback record if it is USERONLY or change the callback from ANYONE to USERONLY and specify a User ID to give it to. Note, you can only do this if you have permissions in your USER account to modify leads.

Administrators can also purge old callbacks by using the links at the bottom of the screen.

There are also Callback management utilities available to level 9 Managers within the Admin Utilities section of the admin screens.

NOTE: An option can be added to the `AST_DB_dead_cb_purge.pl` script to remove duplicate callback entries for a single lead, keeping the newest one only (contact your administrator to set this up).

## Timeclock

Figure 56. Timeclock

The figure consists of two side-by-side screenshots of a web application interface. Both screenshots have a light blue background and a dark blue header bar. The left screenshot shows a login form with the following elements: 'User Login:' followed by a text input field containing '2424'; 'User Password:' followed by an empty text input field; and a 'SUBMIT' button below the password field. At the bottom left, it reads 'VERSION: 2.12-17 BUILD: 161106-2112'. The right screenshot shows the state after a login attempt. It displays the message 'You last logged-out at: 2016-10-20 00:07:01' in a dark font. Below this, it says 'Click LOGIN below to log-in' in a lighter font. A 'LOGIN' button is centered below the text. At the bottom left, it also reads 'VERSION: 2.12-17 BUILD: 161106-2112'.

As of version 2.0.5 of Dialer there is now a separate time clock application built in to Dialer . This application can be used by an Dialer user, and with Dialer agents you can force them to log in on the Timeclock before they are allowed to log in to the Dialer agent interface (This is a User Group setting). The process of logging in to the time clock is very simple and is covered in more detail in the Dialer Agent Manual. There is a link to log in to the Time clock at the top of the Dialer agent interface log in screen as well as at the top of the Dialer Administration interface.

There is also an Administrative utility to alter timeclock records and there are two reports that utilize Time clock data. For more information on the timeclock reports, see the Dialer Stats and Reports section of this manual.

### Timeclock Records Editing

Time clock logs are stored in an active log table as well as an audit log table in the database. The audit log exists to show what was originally logged and it cannot be altered (The audit log is only viewable by a system administrator). The active timeclock log shows the active time clock records with any administrative changes that were made including noting if a record was changed or not. A timeclock record can only be changed if the record has both a log in and a log out. If a user is still logged in to the timeclock that active record cannot be altered until that user logs out. There is also a system setting (Timeclock End of Day) to set the force logout time for all users still logged into the system since no timeclock record can be more than 24 hours long. A timeclock record will be marked as AUTOLOGOUT if a force logout by the system has occurred at the Timeclock End of Day.



## ***User Status Page***

The first place that a timeclock record can be changed is on the User Status page. There are links to the User Status page from the Dialer Real-time screen as well as from the User Modification page and the User Stats page. On the user Status page you can see when the user logged in to the timeclock, if they are logged in, as well as the option to force log them in or out of the timeclock.

## ***User Stats Page***

The second place that you can edit timeclock records is on the User Stats page. This page shows all of the different kinds of activities that an agent can do and it will show the timeclock activity of an agent within the system as well. To alter a timeclock record from this page, first select the date range at the top of the page and click submit, then go down to the TIMECLOCK LOGIN/LOGOUT TIME section of the page and you can click on the timeclock ID of the record that you wish to change. This will take you to the timeclock record edit screen. On this screen you can change the Login and Logout times as well as add notes about why you would be making the change. If you do change the Login or Logout times the system will validate your changes and if they are not valid it will not let you click on the Submit button. This can happen if the date is not formatted properly or if the logout time is before the login time, or the logout time is more than 24 hours past the login time.

**Date Fields** - These fields are where you define the date range you want to see User Stats for. Default is today.

**Call Status** - If you only want to see call logs on this page with a specific status, enter it here. Default is -blank- for disabled.

**Search Archived Data** - If your system has log archiving enabled, and you want to search within the archives for User log data, select this checkbox. Default is unchecked.

**Agent Pause Logs** - This report will show you the agent pauses with pause codes and pause time durations for the selected date range.

**Agent Parked Call Logs** - This report will show you the call details and durations for calls that this agent has parked on hold for the selected date range.

**Agent Talk Time and Status** - This section will show you all of the total number of calls and call durations by status of inbound and outbound calls handled by this agent during the selected time range. This data is based upon call log data, not agent activity log data, which is separate and may not show the same call durations.

**Agent Login and Logout Time** - This section will show you the Agent Screen Login and Logout events for this agent for the selected time range.

EVENT = Either a LOGIN or LOGOUT event, the agent logging into or out of the Agent Screen.

DATE = The date-time-stamp of the event.

CAMPAIGN = The campaign the agent was logging into or out of.

GROUP = The User Group of the agent at the time they logged in or out.

SESSION = The Session ID when the agent first logged in to that session.

HOURS = The time duration, in hours:minutes:seconds, of the agent session.

SERVER = The IP Address of the server that the agent logged into. For some LOGOUT events, this area may show that a manager force-logged-out the agent, with the user ID of the manager that forced the logout of the agent session.

PHONE = The phone account that the agent logged in with.

COMPUTER = The IP Address that the agent logged in from. If the server or agent are behind a separated network, this IP Address may be for a network gateway device instead of the actual computer.

PHONE LOGIN = The Phone Login used when the agent logged into the agent screen. This may be different from the PHONE if Phone Aliases are in use on the system.

PHONE IP = If enabled on your system, this can show the IP address of the phone device that the agent connected to their session through.

**Agent Webserver and URL Logins** - This section will show what web servers and URLs the agent was using at the time they logged in for the selected time range.

DATE = The date-time-stamp of the event.

CAMPAIGN = The campaign the agent was logging into or out of.

GROUP = The User Group of the agent at the time they logged in or out.

DIALER SERVER = The IP Address of the dialer (not web) server that the agent logged into.

WEB SERVER = The webserver/hostname gathered from the agent interface at the time the agent logged in.

LOGIN URL = The full URL of the agent interface where the agent logged in.

**Timeclock Login and Logout Time** - This section will show the timeclock punch log for this User for the selected time range.

ID EDIT = This is the unique Timeclock punch ID number. If you are a manager with the ability to edit timeclock records then you can click on this ID number to see the record and modify the punch times and add comments to the punch record. If a punch record has been edited by a manager or is a system forced logout, you will see a star next to the ID here.

EVENT = Either a LOGIN or LOGOUT event, the agent logging into or out of the Timeclock.

DATE = The date-time-stamp of the event.

IP ADDRESS = The IP Address that the agent logged in from. If the server or agent are behind a separated network, this IP Address may be for a network gateway device instead of the actual computer.

GROUP = The User Group of the agent at the time they punched in or out of the timeclock.

HOURS = The time duration, in hours:minutes:seconds, of the timeclock session.

**Closer In-Group Selection Logs** - This section will show the In-Groups, Email-Groups and Chat-Groups that the agent is set to receive calls from after they log into the agent screen.

DATE TIME = The date-time-stamp when the specific agent selection action was completed.

CAMPAIGN = The campaign the agent was logging into.

BLEND = Whether the agent was set to also take outbound calls during this session, 1 = Yes, 2 = No.

GROUPS = The list of In-Groups, Email-Groups and Chat-Groups that the agent is set to receive calls from starting at this selection record time.

MANAGER = If a manager has used the Real-Time Report to modify the agent selected in-groups, the user ID of the manager will appear in this column.

**Outbound Calls for this Time Period** - This section will show the manual dial and auto-dial outbound calls handled by this agent during the selected time period, most recent call first.

DATE TIME = The date-time-stamp when the outbound call was initiated in the system.

LENGTH = The length of the outbound call in seconds.

STATUS = The status assigned to the call by the agent after the call was hung up.

PHONE = The phone number the call was placed to.

CAMPAIGN = The campaign the agent was logged into when the outbound call was placed.

GROUP = The User Group that the agent was a member of at the time the call was placed.

LIST = The List ID of the lead that was called at the time the call was placed.

LEAD = The Lead ID of the lead that was called. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

HANGUP REASON = The reason the call was hung up, if the AGENT or CALLER hung up the call first.

**Outbound Emails for this Time Period** - This section will show the outbound emails sent through the Agent Screen in response to inbound emails that the agent has handled during the selected time period, most recent email first.

DATE TIME = The date-time-stamp when the outbound email was sent.

CAMPAIGN = The campaign the agent was logged into when the outbound call was placed.

EMAIL TO = The email address that the email was sent to.

ATTACHMENTS = A list of any attachments that the agent included in their reply email.

LEAD = The Lead ID of the lead that was emailed. You can click on this link to see more details about this lead, including past emails and the ability to modify lead information.

MESSAGE = The beginning of the message of the email that was sent.

**Inbound Closer Calls for this Time Period** - This section will show the inbound and closer-transferred calls handled by this agent during the selected time period, most recent call first.

DATE TIME = The date-time-stamp when the inbound call was received in the In-Group.

LENGTH = The length of the inbound call in seconds.

STATUS = The status assigned to the call by the agent after the call was hung up.

PHONE = The phone number the call was received from.

IN-GROUP = The In-Group the call was received into.

WAIT = The amount of time in seconds the customer had to wait before being sent to the agent.

AGENT = The amount of time in seconds the customer was on the phone with the agent.

LIST = The List ID of the lead that called in at the time of the call.

LEAD = The Lead ID of the lead that called in. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

HANGUP REASON = The reason the call was hung up, if the AGENT or CALLER hung up the call first.

**Agent Activity for this time period** - This section will show the agent screen logged-in activity for the selected time period, most recent activity first. Each record is started by a PAUSE action.

DATE TIME = The date-time-stamp when the agent started a new pause state.

PAUSE = The number of seconds the agent was in a paused state for this entry.

WAIT = The number of seconds the agent was waiting for a phone call for this entry. For outbound manual dial phone calls, this is the ring time before the call was answered.

TALK = The number of seconds the agent was in talking state for this entry.

DISPO = The number of seconds the agent was in the disposition screen for this entry.

DEAD = The number of seconds while in the talking state after which the customer had already hung up.

CUSTOMER = The number of seconds the agent was actually speaking to the customer.

VISIBLE = The number of seconds the agent screen was viewable since the last time it was hidden.

HIDDEN = The number of seconds the agent screen was hidden from the view of the agent since the last time it was visible.

STATUS = The status assigned to the call by the agent after the call was hung up.

LEAD = The Lead ID of the lead that was handled by the agent. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

TYPE = The type of call handled by the agent during this activity record. -M- is manual dial outbound, -A- is auto-dial outbound, -I- is an inbound call, -E- is an inbound email and -C- is a website customer chat.

CAMPAIGN = The campaign the agent was logged into when this agent activity happened.

PAUSE CODE = The pause code selected or assigned to this agent activity record.

**Recordings for this Time Period** - This section will show the call recordings made for this User during the selected time period, most recent recordings first.

LEAD = The Lead ID of the lead that was handled by the agent during this call recording. You can click on this link to see more details about this lead, including past calls, recordings and the ability to modify lead information.

DATE TIME = The date-time-stamp when the call recording was started.

SECONDS = The length in seconds of the call recording.

RECID = The unique recording ID in the system for this call recording.

FILENAME = The file name of the call recording, without the suffix extension at the end.

LOCATION = The URL or web address of the recording. This link may be able to be clicked on to download or listen to the call recording, depending on how your system is set up.

MUTE = If recording muting is allowed on your system, this will show the number of times during the call recording that muting was enabled, if any.

**Manual Outbound Calls for this Time Period** - This section will show the manual dial phone calls placed by the agent, including 3way calls, during the selected time period, most recent call first.

DATE TIME = The date-time-stamp when the outbound call was initiated by the agent.

CALL TYPE = The type of phone call placed.

SERVER = The IP Address of the server that the agent placed the call from.

PHONE = The phone number the call was placed to.

DIALED = The dial string the call was placed using.

LEAD = The Lead ID of the lead that was called. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

CALLERID = The outbound Caller ID Number that was used when the call was placed.

ALIAS = If a Phone Alias was selected by the user when the call was placed, it will be shown here.

PRESET = If a Preset number was selected by the user when the call was placed, it will be shown here.

C3HU = If the call was a 3way call, and the customer hung up before either of the other two parties, the amount of time the customer was in the call will be shown here.

**Lead Searches for this Time Period** - This section will show the agent screen lead searches conducted

by the agent during this time period, most recent search first.

DATE TIME = The date-time-stamp when the lead search was conducted by the agent.

TYPE = The type of search that was conducted.

RESULTS = The number of matches that were returned to the agent by the system for the search.

SEC = The number of seconds the search took for the system to process before returning results.

QUERY = The search query as run by the system.

**Preview Lead Skips for this Time Period** - This section will show the previewed leads that were skipped by the agent during this time period, most recent skips first.

DATE TIME = The date-time-stamp when the previewed lead was skipped by the agent.

LEAD = The Lead ID of the lead that was skipped. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

STATUS = The status of the lead that was skipped.

COUNT = The called count of the lead that was skipped.

CAMPAIGN = The campaign the agent was logged into when this previewed lead was skipped.

**Agent Lead Switches for this Time Period** - This section will show the Agent Lead Switches that happened during the selected time period, a lead switch is when an inbound call goes to the agent, the agent searches for a lead in the system and they select another lead to tie their current call to. Most recent lead switch is shown first.

DATE TIME = The date-time-stamp when the lead was switched by the agent.

FROM LEAD ID = The Lead ID of the lead that the agent started the call with. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

TO LEAD ID = The Lead ID of the lead that the agent switched the call to during the call. You can click on this link to see more details about this lead, including past calls and the ability to modify lead information.

CALL ID = The original Call ID in the system before the Lead ID was switched.

UNIQUEID = The phone system uniqueid of the call that had its lead switched.

PHONE = The phone number of the lead that was switched.

CAMPAIGN = The campaign the agent was logged into when they switched the lead.

**Manager Pause Code Approvals for this Time Period** - This section will show the agent pause code approvals that this Manager User approved during the selected time period, only for pause codes that require manager approval, most recent approvals first.

DATE TIME = The date-time-stamp when the agent pause code was approved by this user.

AGENT = The User ID of the agent that had their pause code approved.

AGENT USER GROUP = The User Group of the agent at the time that they had their pause code approved.

CAMPAIGN = The campaign the agent was logged into when they had their pause code approved.

PAUSE CODE = The pause code that was approved.

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

## Server Stats and Reports (System Summary)

### Real-Time Reports

- VERM - Enhanced Reporting Module
- Real-Time Main Report
- Real-Time Campaign Summary
- Real-Time Whiteboard Report

### Inbound and Outbound Calling Reports

- VERM - Enhanced Reporting Module
- Inbound Report - v2
- Inbound Report by DID
- Inbound Service Level Report
- Inbound Summary Hourly Report
- Inbound Daily Report
- Inbound DID Report - DID Summary - Agent DID
- Inbound IVR Report
- Inbound Forecasting Report - Advanced
- Outbound Calling Report
- Outbound Summary Interval Report
- Outbound IVR Report - Export - Callmenu Agent
- Outbound Lead Source Report
- Frontier - Closer Report - Detail
- Lists Pass Report
- Lists Campaign Statuses Report
- Called Counts List IDs Report
- Campaign Status List Report
- Dialer Inventory Report
- Inbound Email Report
- Email Log Report
- Inbound Chat Report
- Export Calls Report
- Export Leads Report

### Agent Reports

- VERM - Enhanced Reporting Module
- Agent Time Detail
- Agent Status Detail - Inbound Summary
- Agent Performance Detail
- Team Performance Detail
- Performance Comparison Report
- Single Agent Daily - Time
- User Group Login Report
- User Group Hourly Report - v2
- User Stats
- User Time Sheet

### Time Clock Reports

- User Timeclock Report
- User Group Timeclock Status Report
- User Timeclock Detail Report

### Other Reports and Links

- Server Performance Report
- Maximum System Stats
- Administration Change Log
- QueueMetrics Reports
- List Update Stats
- CallCard Search
- Quality Control Report

### Custom Reports

- New test report
- Another test reports
- 1-month APD report for test campaigns
- VLC Leads Export Report
- διαχείριση
- 2nd Test report
- 3rd Test report

SERVER ±	DESCRIPTION	IP	ACT	LOAD	CHAN	AGNT	DISK	OUTBOUND	INBOUND
dev-db	Dev DB	192.168.198.3	Y/Y/N	0 - 1%	0	0	41%	<a href="#">LINK</a>	<a href="#">LINK</a>
dev-dial1	ViciBox 9 - Asterisk 13	192.168.198.5	Y/Y/Y	4 - 1%	0	0	21%	<a href="#">LINK</a>	<a href="#">LINK</a>
dev-dial2	ViciBox 8 - Asterisk 11	192.168.198.6	Y/Y/Y	9 - 1%	0	0	4%	<a href="#">LINK</a>	<a href="#">LINK</a>
dev-dial3	ViciBox 7 - Asterisk 1.8	192.168.198.7	Y/Y/Y	2 - 0%	0	0	4%	<a href="#">LINK</a>	<a href="#">LINK</a>
INTEST	Testing	10.10.10.10	N/N/N	0 - 100%	0	0	%	<a href="#">LINK</a>	<a href="#">LINK</a>
TESTast1	Test install of Asterisk server	192.168.198.4	N/N/N	673 - 50%	0	0	20%	<a href="#">LINK</a>	<a href="#">LINK</a>

[Admin Utilities](#)

Figure 57. Statistics and Reports

## Dialer STATS AND REPORTS

You can get to the Stats and Reports page by clicking on the REPORTS link at the far left of the top of the section bar on the left side menu bar of the admin.php page. This page has links to many different summary and real-time reports that you can run on the activity of your Dialer system.

## System-Wide Reports

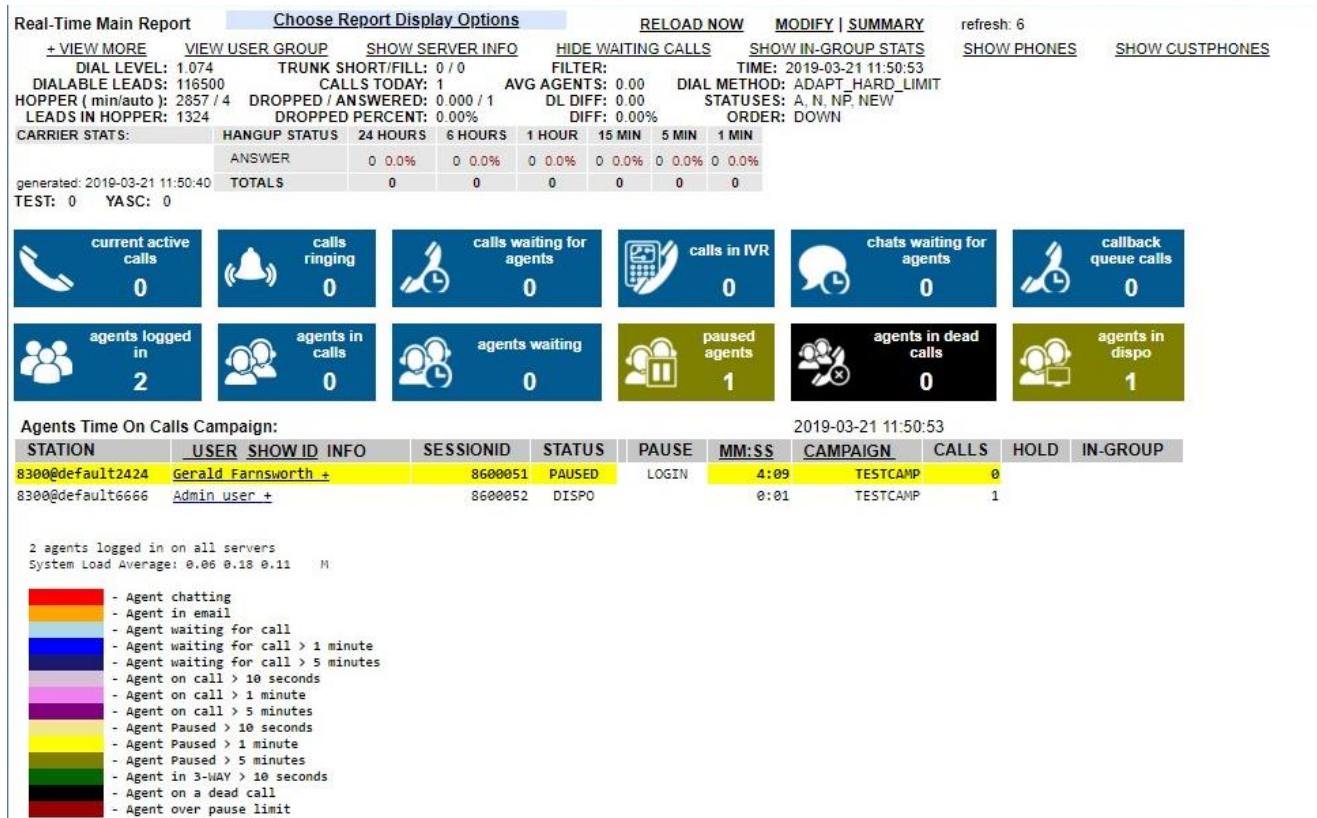
The first set of reports available from the REPORTS section are all System-Wide reports, meaning that on a multiple server setup they show stats for activity across all servers together.

Most of these reports are available in TEXT and HTML formats. The TEXT display type will show the data in ASCII fixed font formatting, while the HTML display type will show the data in a more visually pleasing way. If you want to change the default display type on your system, just change the Admin → System Settings → Report Default Format value.

Most of these reports also have an option to “Search archived data”. This is useful if you want to run a report on older data that has been archived on your system.

You can also add Custom Reports to this page by using the Custom Report Admin page linked from the Admin Utilities page at the bottom of this screen.

Figure 58. Real Time Main Report per Campaign



### REAL TIME MAIN REPORT - PER CAMPAIGN

This is also known as the “RealTime Report”, and is also linked to from the top of the campaign modification pages. This report refreshes every 40 seconds by default. The refresh rate can be modified from the “Choose Report Display Options” link at the top of the real-time screen. The report displays from the campaign (or campaigns) you are viewing: Dial level, statuses to be dialed, the order



of the leads to be dialed, the lead filter if there is one, the hopper level for this campaign, the leads currently in the hopper for this campaign right now, the number of dialable leads in the entire database according to the criteria set for the campaign, the number of calls placed (or taken) for this campaign today, the number of dropped and answered calls in this campaign today, the drop percentage(out of answered calls) and the current time. Out of the TRUNK SHORT/FILL numbers, the SHORT(or first number) will show how many calls the dialer is unable to place because there are not enough lines available for the servers dialing on this campaign, and the FILL number will show how many lines on other dialers are being used to try to make up the shortfall.

Below these stats is a listing of the number of live calls(or calls being placed) for this campaign, the number of agents on calls, the number of agents waiting for calls and the number of agents that are currently paused in the campaign. The "calls waiting" and "agents waiting" numbers if higher than zero will turn red or blue respectively and get darker as their number goes up, being a very visible indicator of how the dialing for the campaign is going. Below these lines is the listing of agents logged-in, color coded their state: yellow is paused, blue is waiting for a call, white is on a call, purple is being on a call and black is the agent is still on the call screen but the customer has hung up. These colors also get darker the longer the agent is in a state.

If you click on the "Choose Report Display Options" link at the top of the page, a panel will open up with several options in it. One of the options is for inbound. If you select NO then no accounting for inbound calls will be taken for the numbers in the report, YES will include inbound calls for the in-groups allowed for the campaign into the report, and ONLY will only show inbound calls coming into allowable in-groups for the selected campaigns. If you have this set to ONLY, then you will notice that the stats at the top change and you will see items like average hold time and other inbound-only statistics. The "Select Campaigns" allows you to view just campaign in the real-time report, or by holding down "ctrl" and selecting several campaigns. When viewing multiple campaigns in the real-time report, keep in mind that the statistics displayed represent either combined totals or averages (depending on the stat). "Select User Groups" offers the same options, except sorted by User Group. Multiple groups can be selected using "ctrl".

other options include:

- Agent Time Stats displaying time clock information
- Running the "Dialable Lead Alert" shows which campaigns do not currently have lead loaded into the dial hopper
- "Show Ingroup Drop Row" displays the in-group on inbound calls, along with the total time the spent in queue.
- Another option is to see carrier hangup code statistics for calls that ended in the last several minutes and hours.

An optional element for this screen are counts of the dispositions for status categories. Up to 4 of these Status Category counts can be displayed below the LEADS IN HOPPER line at the top of the report.



Real-Time Main Report [Choose Report Display Options](#) [RELOAD NOW](#) [MODIFY | SUMMARY](#) refresh: 2

[+ VIEW MORE](#) [VIEW USER GROUP](#) [SHOW SERVER INFO](#) [HIDE WAITING CALLS](#) [SHOW IN-GROUP STATS](#) [SHOW PHONES](#) [SHOW CUSTPHONES](#)

DIAL LEVEL: 1.080 TRUNK SHORT/FILL: 0 / 0 FILTER: TIME: 2016-11-25 08:51:37  
DIALABLE LEADS: 80505 CALLS TODAY: 0 AVG AGENTS: 0.00 DIAL METHOD: ADAPT\_HARD\_LIMIT  
HOPPER ( min/auto ): 2205 / 4 DROPPED / ANSWERED: 0.000 / 0 DL DIFF: 0.00 STATUSES: A, N, NP, NEW  
LEADS IN HOPPER: 172 DROPPED PERCENT: 0.00% DIFF: 0.00% ORDER: DOWN  
TEST: 0 YASC: 0

current active calls: 0 calls ringing: 0 calls waiting for agents: 0 calls in IVR: 0 chats waiting for agents: 0

agents logged in: 1 agents in calls: 0 agents waiting: 0 paused agents: 1 agents in dead calls: 0 agents in dispo: 0

Agents Time On Calls Campaign: 2016-11-25 08:51:37

STATION	USER	SHOW ID	INFO	SESSIONID	STATUS	PAUSE	MM:SS	CAMPAIGN	CALLS	HOLD	IN-GROUP
8300@default6666	Admin			8600051	PAUSED	LOGIN	0:37	TESTCAMP	0		

Agent: 6666 - Admin Campaign: TESTCAMP [Close](#)

Selected In-Groups: AAA\_ALL\_TEST - Alpha test  
AGENTDIRECT - Single Agent Direct Queue  
AGENTDIRECT\_CHAT - Agent Direct Queue for Chats  
AGENTDIRECT9 - always on agentdirect  
CHAT\_TEST\_GROUP - initial chat test group  
CL\_GALLERIA - TEST inbound galleria  
DEV\_EMAIL - Dev test email  
EMAILCOPY - Test ingroup for priority  
JON\_TEST\_IN\_EMAIL - Jons test email ingroup  
jonstestin - jons test ingroup

Change, Add, Remove: CHANGE - Set in-groups to those selected above

Blended Outbound Autodial: No

Set As User Default: No

[Submit Changes](#)

**Figure 59. Changing In-Groups from the Real-time report**

## REAL TIME MAIN REPORT – CHANGE IN-GROUPS

Added in the previous 2.2.1 release is the ability to change the selected In-Groups for an agent immediately from the Real-Time report without requiring an agent to log out.

To do this you simply need to click on the plus sign “+” on the left side of the USER column for the user that you want to modify. When you click on the plus, you will see something like the image in the figure above.

Now you can select one or more In-Groups that this agent will take calls from (you can select more than one by holding down the “Ctrl” key on your keyboard as you click on them).

The next field is where you can choose to Add, Remove or Change the In-groups you have selected from the in-groups that the agent has selected currently. Add will only add in-groups and not remove any from the ones currently selected for the agent, Remove will only delete in-groups from the ones selected for the agent. Change will replace whatever is currently selected for the agent with what you have selected in the “Selected in-Groups” select list.

Next is the Blended option. This will enable or disable automatic outbound dialing for this agent if it is available for the campaign.

The last option will allow you to set what you have selected as the default selected in-groups for the agent if this is set to YES.

To have full access to this feature, your user account must have the following settings set to “1”: View Reports, API Access, Change Agent Campaign, Modify Users.

Select Campaigns:

- ALL-ACTIVE -
- 456 - HOSTCOMM Test Campaign
- ALTTEST - Alt dialing test
- APPTAGNT - Appointments All Agents
- APPTENG - Appointments English
- APPTSPA - Appointments Spanish
- EMAILTST - Inbound email tester
- JDTEST - JD Test set con email

(To select more than 1 campaign, hold down the Ctrl key and click)

Select User Groups:

- ALL-GROUPS - All user groups
- 5000 - admin user group test
- 7457 - 7457
- 7ADMIN - 7 ADMIN
- ADMIN - VICIDIAL ADMINISTRATORS
- AGENTS - VICIDIAL AGENTS
- APIUSER - APIUSER
- april - april test

Select In-Groups:

- ALL-INGROUPS -
- \_STAY- Testing options
- 123- enfjenfj
- 25\_CL\_in- Test 2
- 255CL\_in- Test 1
- 5001- Robert 501
- 9999999- 9999999
- AAA\_ALL\_TEST- Alpha test

Close Panel

Screen Refresh Rate: 10 seconds

Inbound: Yes

Monitor: NONE

Phone:

Dialable Leads Alert: NO

Show Drop In-Group Row: NO

Inbound SLA Stats: NO

Show Cust. Phone Code: NO

Show Carrier Stats: NO

Show Presets Stats: NO

Agent Time Stats: NO

Parked Call Stats: NO

In-group color override: NO

Display as: HTML

SUBMIT

VERSION: 2.14-45 BUILD: 230308-0215

Figure 60. Live Monitoring using a phone entry from the Real-time report

## REAL TIME MAIN REPORT – LIVE AUDIO MONITORING

Also available from the “Choose Report Display options” is the ability to live monitor or barge into agent calls. From the Monitor pulldown menu select either MONITOR, BARGE or WHISPER(if it is enabled on your system). In the phone field below, indicate the phone extension you will be listening from, and click “submit”. You will now be back at the Real Time report screen and each agent will have a “LISTEN” link to the right of their names. Click to LISTEN to the agent and it will ring your phone with a blind monitored session on the phone. See Tutorial Q for an example of how to set this up and use it with a mobile cellphone.

## REAL TIME MAIN REPORT – ALL CAMPAIGNS SUMMARY

This report is basically the top summary section of the Real-time(Time-on-VDAD) report for all active campaigns on the system put into a single page without specific agent or specific call information. The name of each campaign in the report is also a link to go to its own Real-time Campaign report. There is

also a Modify link that will go to the Campaign modification page for that campaign.

## **REAL TIME WHITEBOARD REPORT**

This report allows the user to display reports in a large graph form with associated statistics printed with the report, and the report will be refreshed at a set interval. This is useful for overhead projections where the user needs to display a set of data in a comprehensive, easy-to-read format. Also, when the user selects a report to display, any report option relevant to that report will be highlighted in red: campaigns, status flags, etc....

**Report Type** - The type of report to display:

Disposition Totals - A breakdown of disposition totals of calls made.

Agent Performance Totals - Shows total calls and sales for agents within a specified date-time range.

Agent Performance Rates - Shows conversion rates for agents within a specified date-time range.

Team Performance Totals - Shows total calls and sales for teams/user groups within a specified date-time range.

Team Performance Rates - Shows conversion rates for teams/user groups within a specified date-time range.

Floor Performance Totals (ticker) - Shows cumulative total of sales in a -ticker- format-line graph, with an option to draw a target gross sales.

Floor Performance Rates (ticker) - Shows time-elapsed conversion in a -ticker- format-line graph, with an option to draw a target conversion rate.

Ingroup Performance Total - Shows total calls and sales for selected ingroups within a specified date-time range.

Ingroup Performance Rates - Shows conversion rates for selected ingroups within a specified date-time range.

DID Performance Total - Shows total calls and sales for selected DIDs within a specified date-time range.

DID Performance Rates - Shows conversion rates for selected DIDs within a specified date-time range.

**User Groups,In-groups,Campaigns,Users,DIDs,Status flags** - Parameters that may or may not be required based on the type of report run. Available options are dependent on the user permissions. Additionally, selecting specific campaigns combined with selecting -ALL- for ingroups will restrict the -ALL- selection to only ingroups for the selected campaigns. Specific campaign selection will also limit the statuses counted if any status flags are selected.

**Start date/time** - If filled out, the starting date and time that the report will use up through the current date and time when compiling the report.

**Show results for the past X hours** - If filled out and the start date-time is NOT filled out, the selected report will compile data starting at the time X hours ago up through the current time, which makes it a dynamic starting time as opposed to the set date-time used in the previous parameter.

**Target per unit** - The target number of sales per -unit-, which refers to users,user groups,ingroups,DIDs,etc depending on the report type selected, displayed as a horizontal line. | unit-, which refers to users,user groups,ingroups,DIDs,etc depending on the report type selected, displayed as a horizontal line.

**Target gross sales** - The target number of total sales for ticker reports, displayed as a horizontal line.

Queue: 00-ALL Campaigns and In-Groups

Report: All reports

-- RUN REPORT --&gt;

**Agent report**

Filtered for agent:

- Today
- Yesterday
- Day before yesterday
- Last 24 hours
- Last 7 days
- Last 30 days
- Last 90 days

**Quality Assessment**

Start wallboard

**Real-time reports**Start wallboard  
Real-time report**Quick activity reports**

- Today
- Yesterday
- Day before yesterday
- Last 24 hours
- Last 7 days
- Last 30 days
- Last 90 days

**Custom report**

Run custom report

**Wallboards**

Wallboard

**Settings:**

- Users
- Queues
- User groups
- Locations
- Statuses/Outcomes
  - Campaign
  - System
- Pause codes
- IVR/Call menus
- DID/DNIS lines

**Figure 61. VERM Front Page****VERM - ENHANCED REPORTING MODULE**

The VERM enhanced reporting module is an all-in-one reporting solution, including real-time, call handling and agent reports together in a single integrated interface. Most of the information included in VERM is available in the other standard built-in reports, but in VERM they are visualized differently.

**Queue** - A queue is a collection of campaigns and ingroups to report on - these are created and modified through the admin section if the user has the privileges to use them.

**Report** - Enhanced report can run one of three report types - "All reports" will show all report sections enhanced reporting offers, "Quick agents reports" limits it to 5 report sections all relating to agent activity: ANSWERED, ANSWERED DETAILS, AGENTS, AGENT DETAILS, and OUTCOMES. "Quick reports" generates two report sections, STATS and CALLS, that combine together specific sub-reports found under other report sections.

**Agent Report** - You can run the "All reports" report type for a specific agent under the selected/default queue via selecting said agent from this dropdown, and then selecting a date interval underneath the dropdown.

**Quality Assessment** - This is simply another link to the main wallboard.

**Real-time reports** - These are links to the main wallboard report and the real-time report.

**Quick Activity reports** - Clicking on any of these links will take you to a report for the date range you click on, for whatever queue/agent/report type is selected on the page at the time.

**Custom report** - This will take you to a web form allowing you to run a custom enhanced report you can define by many more parameters than are given from the main report page.

**Wallboard** - This is a link to a special real-time report that will show up-to-the-second stats for various ingroups/campaigns/users throughout the current day.

**Settings** - All links provided in this section point to the corresponding settings pages in the administrator interface, where users/queues/user groups/etc can be added/modified/deleted.

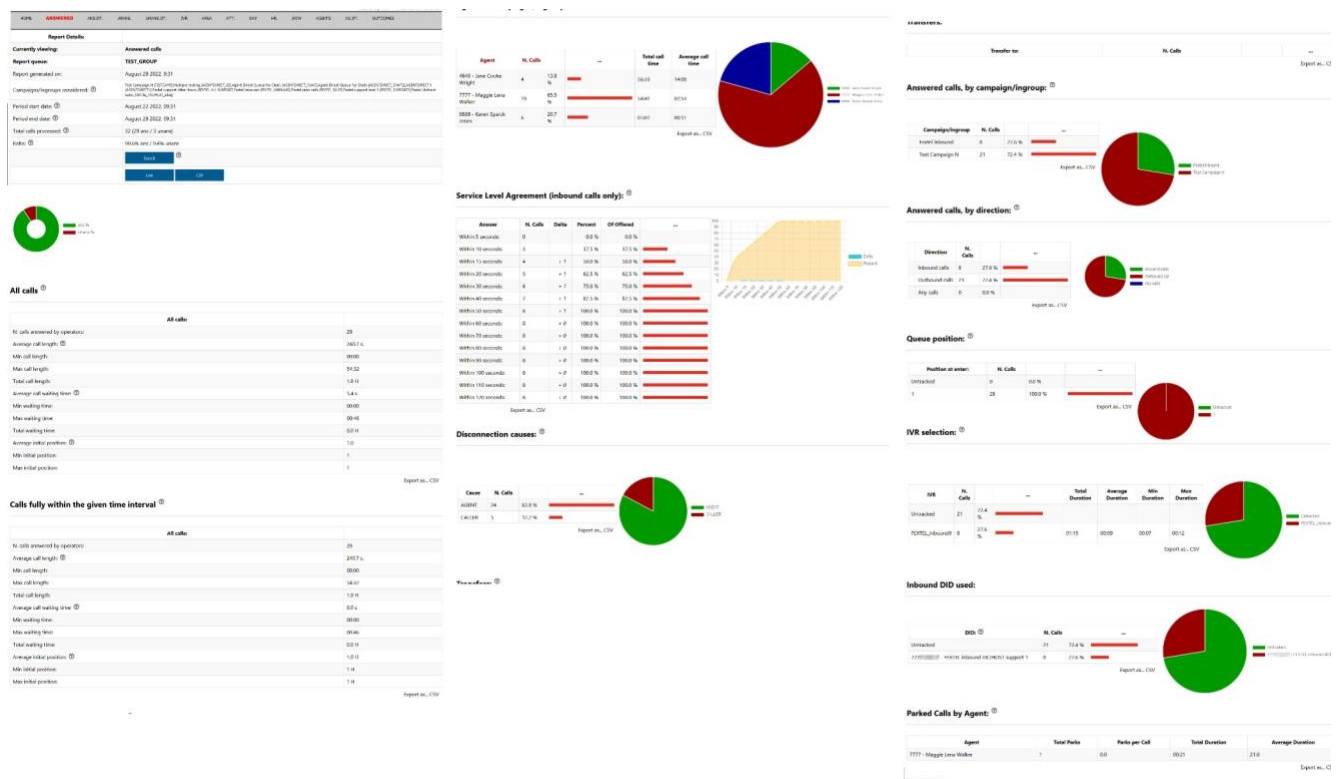


Figure 62. VERM Aswered report

**Campaigns/ingroups considered** - This is a list of all the campaigns and ingroups that are categorized under the selected report queue.

**Period start date** - This is the start date and time used for querying the database to generate the stats displayed.

**Period end date** - This is the end date and time used for querying the database to generate the stats displayed.

**Total calls processed** - This is the sum of all inbound and outbound calls from the outbound call log



and inbound call log tables per the report parameters defined by the user, excluding any disposition given in the "exc\_addtl\_statuses" variable in the "VERM\_REPORT\_OPTIONS" settings container (by default only "AFTHRS" calls are excluded). Answered calls are counted as such if there is a user ID on the log other than "VDAD" or "VDCL". Ergo, calls are considered unanswered if the user ID on the log record reads "VDAD" or "VDCL".

**Ratio** - The percentage breakdown of answered and unanswered calls per the report parameters defined by the user. This is also visually represented by the donut graph below it.

**Search/Link/CSV buttons** - "Search" takes you to the custom report page. "Link" will give a full URL to the current page you're looking at. "CSV" will download the "Report details" section as a CSV file.

**All calls** - This is a set of information pertaining to ONLY answered calls within the report parameters based on the information in the outbound call log and inbound call log tables. "N. calls answered by operators" should always match the count of answered calls shown in the "Total calls processed" statistic in the report header.

**Average/Min/max/total call length** - Average call length is the sum of all answered call lengths divided by the number of answered calls, represented in seconds. Min call length is the shortest call length of all answered calls, based on the length\_in\_sec value in the log tables. Ergo, the max call length is the longest call length of the answered calls. Total call length is the sum of all length\_in\_sec values for all answered calls from both the outbound call log and inbound call log tables (if the report queue covers either/both tables), converted from seconds to hours as a decimal value.

**Average/Min/max/total waiting time** - Wait time only comes from inbound calls (queue\_sec), as outbound calls do not have wait time. Average call waiting time is the sum of all answered calls' wait time divided by the number of answered calls, represented in seconds. Min waiting time is the shortest wait time found on all answered calls within the report parameters. Ergo, the max wait time is the longest wait time found on the answered calls. Total wait time is the sum of all queue\_sec values from the inbound call log tables (if the report queue covers inbound calls), and zero from the outbound call logs (see bolded text above), converted from seconds to hours as a decimal value.

**Average/Min/max initial positions** - Outbound calls have a position of '1'. Position refers to the priority/order of a call based on when it is placed (outbound) or received (inbound). Average initial position is the sum of the positions of each call - for inbound calls this is the queue\_position column from the closer log - divided by the number of answered calls within the report parameters. Min position is the smallest position value of all answered calls - this will always be '1' if any outbound calls are involved. Max position is the largest queue position of all answered calls.

**Calls** - time interval - This is the same set of data for answered calls, except this deals only with calls that are fully within the time frame given by the report parameters. This means that calls which start before the period start date or end after the period start date will not be counted here.

**Average/Min/max/total call length** - Average call length is the sum of all answered call lengths divided by the number of answered calls, represented in seconds. Min call length is the shortest call length of all answered calls, based on the length\_in\_sec value in the log tables. Ergo, the max call length is the longest call length of the answered calls. Total call length is the sum of all length\_in\_sec values for all answered calls from both the outbound call log and inbound call log tables (if the report



queue covers either/both tables), converted from seconds to hours as a decimal value.

**Average/Min/max/total waiting time** - Wait time only comes from inbound calls (queue\_sec), as outbound calls do not have wait time. Average call waiting time is the sum of all answered calls' wait time divided by the number of answered calls, represented in seconds. Min waiting time is the shortest wait time found on all answered calls within the report parameters. Ergo, the max wait time is the longest wait time found on the answered calls. Total wait time is the sum of all queue\_sec values from the inbound call log tables (if the report queue covers inbound calls), and zero from the outbound call logs (see bolded text above), converted from seconds to hours as a decimal value.

**Average/Min/max init. positions** - Outbound calls have a position of '1'. Position refers to the priority/order of a call based on when it is placed (outbound) or received (inbound). Average initial position is the sum of the positions of each call - for inbound calls this is the queue\_position column from the closer log - divided by the number of answered calls within the report parameters. Min position is the smallest position value of all answered calls - this will always be '1' if any outbound calls are involved. Max position is the largest queue position of all answered calls.

**Agents on queue** - This sub-report gives a per-agent breakdown of all answered calls within the report parameters. It shows how many calls each agent answered, the percentage of calls they answered relative to the total number of calls answered, a simple bar graph representation of said percentage, and also the total time the agent spent in calls (based on the length\_in\_sec from the outbound and inbound logs) and the average time per call the agent spent.

**Disconnections** - This sub-report is a simple breakdown of the disconnection causes for the answered calls found within the report parameters. It shows how many calls were disconnected for each reason, the percent of the total calls these causes comprise, and a simple bar graph showing the percentage of each cause relative to one another, along with a pie chart of all causes.

**Transfers** - This is a relatively simple sub-report that breaks down, per in-group, the number of transfers made on calls matching the report criteria. Additionally, the report shows per-ingroup the percentage of transfers made to that ingroup against all transfers pulled for the report.

**Answered calls, by queue** - As the name suggests, this sub-report breaks down the number of answered calls by queue element (i.e. campaign and ingroup). It will show the queue, number of calls, percentage of calls to this queue relative to all answered calls, a bar graph showing the number of answered calls relative to each queue, and a pie chart summing up the number of calls for each queue.

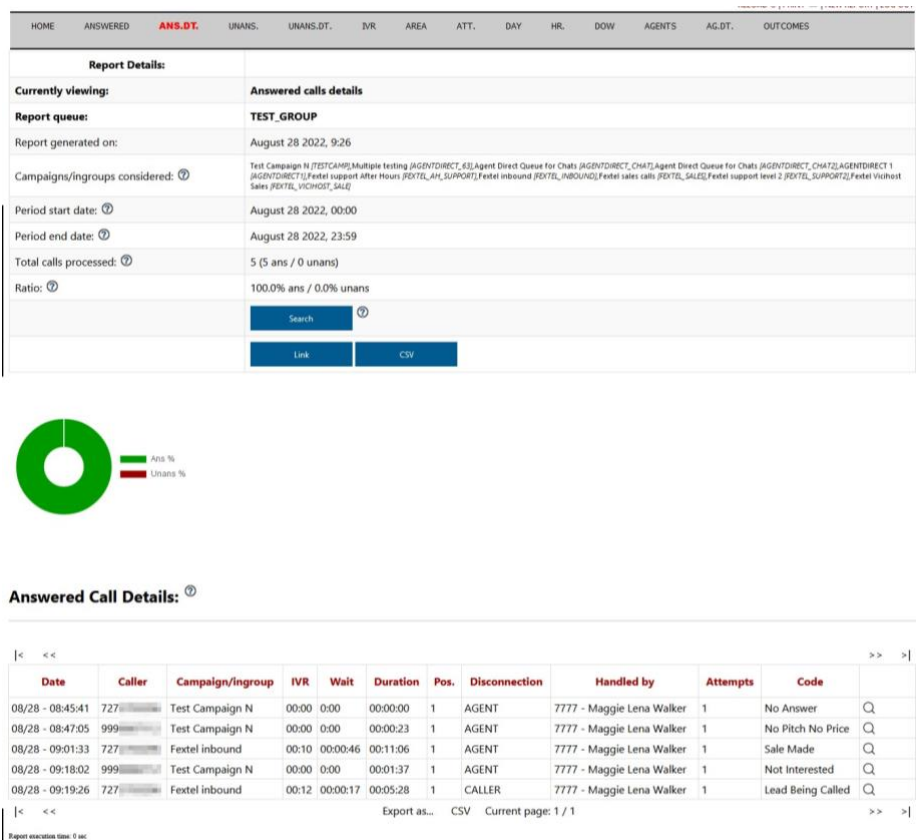
**Answered calls, by direction** - This sub-report breaks down the number of answered calls by direction, inbound or outbound. It will show the direction, number of calls, percentage of calls to the direction relative to all answered calls, a bar graph showing the number of answered calls relative to each direction, and a pie chart summing up the number of calls for each direction.

**Queue position** - This sub-report breaks down the number of answered calls by position (i.e. what order the call was placed in when it was made from/received in the system). It will show the position, number of calls, percentage of calls to the position relative to all answered calls, a bar graph showing the number of answered calls relative to each position, and a pie chart summing up the number of calls for each position.

**IVR selection** - This sub-report breaks down the number of answered calls by IVR path (i.e. the call menus and prompts, if any, that a call went through), and "Untracked" if the call did not pass through an IVR. It will show the path, number of calls, percentage of calls to the path relative to all answered calls, a bar graph showing the number of answered calls relative to each path, and a pie chart summing up the number of calls for each path.

**DID used** - This sub-report breaks down the number of answered calls by DID that the caller used, and will show "Untracked" if the call was not made through a DID. It will show the DID extension and DID name, number of calls, percentage of calls to the DID relative to all answered calls, a bar graph showing the number of answered calls relative to each DID, and a pie chart summing up the number of calls for each DID.

**Parked Calls by Agent** - This shows a breakdown per-agent of the number of times calls were parked based on the report criteria. The data is compiled using report parameters that are found in the park\_log table: user, campaign, server, caller\_code, parked\_time, and uniqueid (uniqueIDs are gathered from the DID/inbound/outbound call log tables where appropriate). In addition to the park count breakdown per agent, the report will also calculate average park attempts per call, total time the agents left calls in park, and the average duration of the agent's total park intervals.



**Figure 63. VERM Answered Detail report**

**Queue Details** - This shows each individual answered call matching the report criteria in a page format, 20 results per page. The results can be sorted by clicking on the corresponding column header - 2023-04-10 version 342 ©2023 ORENCloud

results are sorted *only for the current page*. Additionally, the magnifying glass icon next to each call can be clicked on to display even more detailed information. Also, the results can be downloaded as a CSV document via the CSV link.

## UNANSWERED REPORT

**All calls** - This is a set of information pertaining to ONLY unanswered calls within the report parameters based on the information in the outbound call log and inbound call log tables. "N. calls unanswered" should always match the count of unanswered calls shown in the "Total calls processed" statistic in the report header.

**Average/Min/max/total waiting time before disconnection** - Wait time only comes from inbound calls (queue sec), as outbound calls do not have wait time. Average call waiting time is the sum of all unanswered calls' wait time divided by the number of unanswered calls, represented in seconds. Min waiting time is the shortest wait time found on all unanswered calls within the report parameters. Ergo, the max wait time is the longest wait time found on the unanswered calls. Total wait time is the sum of all queue\_sec values from the inbound call log tables (if the report queue covers inbound calls), and zero from the outbound call logs (see bolded text above), converted from seconds to hours as a decimal value.

**Average/min/max queue position at disconnect** - Outbound calls have a position of '1'. Position refers to the priority/order of a call based on when it is placed (outbound) or received (inbound). Average initial position is the sum of the positions of each call - for inbound calls this is the queue\_position column from the closer log - divided by the number of unanswered calls within the report parameters. Min position is the smallest position value of all unanswered calls - this will always be '1' if any outbound calls are involved. Max position is the largest queue position of all unanswered calls.

**Calls - time interval** - This is the same set of data for unanswered calls, except this deals only with calls that are fully within the time frame given by the report parameters. This means that calls which start before the period start date or end after the period start date will not be counted here.

**Average/Min/max/total waiting time before disconnection** - Wait time only comes from inbound calls (queue sec), as outbound calls do not have wait time. Average call waiting time is the sum of all unanswered calls' wait time divided by the number of unanswered calls, represented in seconds. Min waiting time is the shortest wait time found on all unanswered calls within the report parameters. Ergo, the max wait time is the longest wait time found on the unanswered calls. Total wait time is the sum of all queue\_sec values from the inbound call log tables (if the report queue covers inbound calls), and zero from the outbound call logs (see bolded text above), converted from seconds to hours as a decimal value.

**Average/min/max initial positions** - Outbound calls have a position of '1'. Position refers to the priority/order of a call based on when it is placed (outbound) or received (inbound). Average initial position is the sum of the positions of each call - for inbound calls this is the queue\_position column from the closer log - divided by the number of unanswered calls within the report parameters. Min position is the smallest position value of all unanswered calls - this will always be '1' if any outbound calls are involved. Max position is the largest queue position of all unanswered calls.

**Disconnection causes** - This sub-report is a simple breakdown of the disconnection causes for the unanswered calls found within the report parameters. It shows how many calls were disconnected for each reason, the percent of the total calls these causes comprise, and a simple bar graph showing the percentage of each cause relative to one another, along with a pie chart of all causes.

**Unanswered calls, by campaign/ingroup** - As the name suggests, this sub-report breaks down the number of unanswered calls by campaign/ingroup. It will show the campaign/ingroup, number of calls, percentage of calls to this campaign/ingroup relative to all unanswered calls, a bar graph showing the number of unanswered calls relative to each campaign/ingroup, and a pie chart summing up the number of calls for each campaign/ingroup.

**Unanswered calls, by agent** - As the name suggests, this sub-report breaks down the number of unanswered calls by agent. It will show the agent, number of calls, percentage of calls to this agent relative to all unanswered calls, a bar graph showing the number of unanswered calls relative to each agent, and a pie chart summing up the number of calls for each agent (this is almost always the standard VDAD/VDCL "agent").

**Unanswered calls, distribution by length (inbound calls only)** - This sub-report deals with inbound calls and shows the number of calls unanswered within set intervals. By default the initial interval is 5 seconds, up to a period of 20 seconds, at which point the interval becomes 10 seconds up to 120 seconds. These values (initial interval, initial period, interval, max period) can be adjusted by running a custom report. The report shows the number of unanswered calls within each interval, along with the delta (change) from interval to interval. The "Percent" refers to the number of unanswered calls within the interval relative to the total calls, and the "Of offered" percent is the number of total calls within the interval relative to the total calls, along with a simple bar graph representing the unanswered calls percentage and line graph charting the deltas and percentages.

**Unanswered calls, by keypress/option** - This sub-report breaks down the number of IVR (callmenu) keypresses/options all unanswered calls accumulated. Because a call can record multiple keypresses/options, the total here can be higher than the actual number of calls. It will show the keypress/option, number of times each keypress/option was selected, percentage of this keypress/option relative to all keypresses/options, a bar graph showing the number of keypresses/options relative to each other, and a pie chart summing up the number of keypresses/options.

**Enter queue position** - This sub-report breaks down the number of unanswered calls by initial queue position (i.e. what order the call was placed in when it was made from/received in the system). It will show the position, number of calls, percentage of calls to the position relative to all unanswered calls, a bar graph showing the number of unanswered calls relative to each position, and a pie chart summing up the number of calls for each position.

**Queue position, all calls** - This sub-report breaks down the number of calls by initial queue position (i.e. what order the call was placed in when it was made from/received in the system). It will show the position, number of calls, percentage of calls to the position relative to the total of calls, a bar graph showing the number of calls relative to each position, and a pie chart summing up the number of calls for each position.

**IVR selection** - This sub-report breaks down the number of unanswered calls by IVR path (i.e. the call menus and prompts, if any, that a call went through), and "Untracked" if the call did not pass through

an IVR. It will show the path, number of calls, percentage of calls to the path relative to all unanswered calls, a bar graph showing the number of unanswered calls relative to each path, and a pie chart summing up the number of calls for each path.

**IVR selection, all calls** - This sub-report breaks down the number of calls by IVR path (i.e. the call menus and prompts, if any, that a call went through), and "Untracked" if the call did not pass through an IVR. It will show the path, number of calls, percentage of calls to the path relative to all calls, a bar graph showing the number of unanswered calls relative to each path, and a pie chart summing up the number of calls for each path.

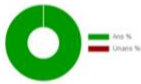
**DID used** - This sub-report breaks down the number of unanswered calls by DID that the caller used, and will show "Untracked" if the call was not made through a DID. It will show the DID extension and DID name, number of calls, percentage of calls to the DID relative to all unanswered calls, a bar graph showing the number of unanswered calls relative to each DID, and a pie chart summing up the number of calls for each DID.

**DID used, for all calls** - This sub-report breaks down the number of calls by DID that the caller used, and will show "Untracked" if the call was not made through a DID. It will show the DID extension and DID name, number of calls, percentage of calls to the DID relative to all calls, a bar graph showing the number of calls relative to each DID, and a pie chart summing up the number of calls for each DID.

**Call overview** - This sub-report gives a per-queue breakdown of all calls within the report parameters. It shows how many calls were offered (i.e. made (outbound) or received (inbound)) in each queue, the number of calls answered in each queue, the number of calls lost (unanswered) in each queue, the average length of all offered calls, the total call length, the average time each call to the queue spent waiting, and the total amount of time calls to that queue were waiting.

**Unanswered Call Details** - This shows each individual unanswered call matching the report criteria in a page format, 20 results per page. The results can be sorted by clicking on the corresponding column header - results are sorted *only for the current page*. Additionally, the magnifying glass icon next to each call can be clicked on to display even more detailed information. Also, the results can be downloaded as a CSV document via the CSV link.

HOME	ANSWERED	ANS.DT.	UNANS.	UNANS.DT.	IVR	AREA	ATT.	DAY	HL	DOW	AGENTS	AG.DT.	OUTCOMES
<b>Report Details:</b>													
Currently viewing:	IVR call statistics												
Report queue:	TEST_GROUP												
Report generated on:	August 28 2022, 9:26												
Campaigns/ingroups considered:	<small>Test Campaign N TESTCAMPSMultiple Testing (AGENTDIRECT, ELSAgent Direct Queue For Chats (AGENTDIRECT, CHAT)Agent Direct Queue For Chats (AGENTDIRECT, CHAT)AGENTDIRECT 1 (AGENTDIRECT)Faster support After Hours (FEXTEL_AH_SUPPORT)Faster inbound (FEXTEL_INBOUND)Faster sales calls (FEXTEL_SALES)Faster support level 2 (FEXTEL_SUPPORT2)Faster Voicechat Sales (FEXTEL_VICHOUST_SALES)</small>												
Period start date:	August 28 2022, 00:00												
Period end date:	August 28 2022, 23:59												
Total calls processed:	5 (5 ans / 0 unans)												
Ratio:	100.0% ans / 0.0% unans												
<input type="button" value="Search"/>													
<input type="button" value="Link"/> <input type="button" value="CSV"/>													



**IVR Traversal:**

IVR path	N. calls	IVR goal report	Success rate	Hangups	Attrition rate
FEXTEL_inbound - FEXTEL_inbound	2	2	100.0 %	0	0.0 %
# 0	2	2	100.0 %	0	0.0 %

Export as... CSV

**IVR Timing:**

IVR path	N. calls	Average time	Total time	Minimum time	Maximum time
FEXTEL_inbound - FEXTEL_inbound	2	0:11	0:22	0:10	0:12
# 0	2	0:11	0:22	0:10	0:12

Export as... CSV

**IVR Goals:**

Goal	IVR path	Selection	N. calls	Average time	Minimum time	Maximum time
Campaign/ingroup: Fotel inbound	FEXTEL_inbound - FEXTEL_inbound	0	2	0:11	0:10	0:12

Export as... CSV

**IVR Details:**

Date	Caller	IVR	IVR Path	DID	Goal
08/28 - 08/01:33	72700000	0:10	FEXTEL_inbound - FEXTEL_inbound => FEXTEL_inbound - FEXTEL_inbound = 0	72700000 - FEXTEL_inbound VICHOST support 1	Fotel inbound
08/28 - 08/19:26	72700000	0:12	FEXTEL_inbound - FEXTEL_inbound => FEXTEL_inbound - FEXTEL_inbound = 0	72700000 - FEXTEL_inbound VICHOST support 1	Fotel inbound

Export as... CSV Current page: 1 / 1

**Figure 64. VERM IVR Stats report**

**IVR Traversal** - This subreport shows all IVR traversal paths taken for calls matching the report parameters and the number of calls that followed each path. A traversal path shows what IVR/callmenus the call went through, and each path also will show a breakdown of the keypresses/options that the calls ended with. In addition to the number of calls, the report will also show how many calls were "goals" (i.e. made it to a queue), and how many were hangups/unanswered, with corresponding percentages for each. Each keypress/option will also have it's own goals/hangups count as well.

**IVR Timing** - This subreport shows all IVR traversal paths taken for calls matching the report parameters and the number of calls that followed each path, along with time statistics for each. A traversal path shows what IVR/callmenus the call went through, and each path also will show a breakdown of the keypresses/options that the calls ended with. In addition to the number of calls, the report will also show the average time a call spent on a path, as well as the total time, minimum time (shortest call of the ones counts) and maximum time (longest call of the ones counted). Each keypress/option will also have it's own time statistics calculated as well.

**IVR Goals** - This subreport shows all goals reached for calls matching the report parameters and the

IVR traversal path that was followed to reach said goal. If a goal is reached via multiple paths within the report results, each path is displayed as a separate line in the report. Each line will show the final selection/keypress/option followed to reach the goal, the number of calls that followed that exact path (including selection/keypress/option), along with the average, minimum, and maximum call length for the associated calls.

**IVR Details** - This subreport shows every individual call matching the report parameters that went through an IVR traversal path. It shows call date and time, the caller's phone number, the traversal path, the DID they called in from, and the goal the call reached. Additionally, the magnifying glass icon next to each call can be clicked on to display even more detailed information.

**IVR Details for survey** - This is a special detailed report showing information for calls that went to a survey group and the survey results. It shows call date/time, the caller phone number, the inbound DID they dialed (if any), and the details report will also show every possible survey prompt for the survey group and what the caller entered at each prompt. If the survey has an associated voicemail, that will be shown. Also, the agent who spoke to the caller prior to passing the caller to the survey will be displayed as well as a link to the recording of said call with the agent.

Report Details:

Currently viewing: Answered/unanswered call counts by area code

Report queue: TEST\_GROUP

Report generated on: August 28 2022, 9:27

Campaigns/groups considered: Test Campaign N (TESTCAMN) Multiple testing (AGENTDIRECT\_KS) Agent Direct Queue for Chats (AGENTDIRECT\_CHAT) Agent Direct Queue for Chats (AGENTDIRECT\_CHAT) AGENTDIRECT 1 (AGENTDIRECT1) Feterlet support After Hours (FOTEL\_AH\_SUPPORT); Feterlet inbound (FOTEL\_INBOUND); Feterlet sales calls (FOTEL\_SALES); Feterlet support level 2 (FOTEL\_SUPPORT2); Feterlet Voicebot Sales (FOTEL\_VOICE\_SALES)

Period start date: August 28 2022, 00:00

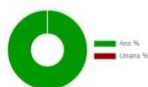
Period end date: August 28 2022, 23:59

Total calls processed: 5 (5 ans / 0 unans)

Ratio: 100.0% ans / 0.0% unans

Search [magnifying glass icon]

Link CSV



**Area Code Report:**

Number of CLID digits to search: 3

Starting from position: 1

SEARCH

**Detail for answered calls:**

Area code/Caller id	Taken calls	Total calling time	Average time per call	Average wait time per call
727	3	16:34	5:31	0:21
999	2	2:00	1:00	0:00

Export as... CSV

**Detail for unanswered calls:**

Area code/Caller id	Lost calls	Average wait time per call	Average position
---------------------	------------	----------------------------	------------------

Export as... CSV

**Figure 65. VERM Areacode report**

**Number of CLID digits to search** - This report parameter tells how many digits to limit the area code length to. By default it's 3 digits but can be as high as 12.

**Starting from position** - This report parameter tells what position to start at for all phone numbers when performing the area code search. By default it's set to "1", meaning it will pull the report results for the number of CLID digits starting at the first digit in the number. You can specify a different starting position depending on your needs. For instance if all your phone numbers start with a country code of "1", you can set the position to "2" to trim those off. Or if you wanted a breakdown by US exchange, you can start at position "4".

**Detail for answered calls** - This report shows a breakdown of area codes/caller IDs (caller IDs defined by the agent via the CLID/position report settings) for the number of answered calls to each area code within the time code for the report. It also shows the total call length of the calls to each area code, the average time spent in each call, and the average time each call spent waiting to be answered.

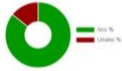
**Detail for unanswered calls** - This report shows a breakdown of area codes/caller IDs (caller IDs defined by the agent via the CLID/position report settings) for the number of unanswered calls to each area code within the time code for the report. It also shows the average time each call spent waiting to be answered, and the average initial queue position of the calls for each area code.

**ACD attempts by campaign/ingroup** - This shows a breakdown by campaign/ingroup of the number of calls to/from selected campaigns/ingroups. "Lost" calls are calls with statuses from the "lost\_statuses" list of dispositions defined in the "VERM\_REPORT\_OPTIONS" settings container. Avr ring and ring refer to the average amount of time and total time lost calls were spent ringing (waiting). "N. taken" is the number of calls handled by a campaign/ingroup, and avg ring and ring refer to the average time and total time the calls in each campaign/ingroup spend in ringing/waiting mode. This only applies to inbound calls/ingroups, as outbound calls don't measure ring time.

**ACD attempts by agent** - This shows a breakdown by queue of the number of calls to/from agents. "Lost" calls are calls with statuses from the "lost\_statuses" list of dispositions defined in the "VERM\_REPORT\_OPTIONS" settings container. Avr ring and ring refer to the average amount of time and total time lost calls were spent ringing (waiting). "N. taken" is the number of calls handled by an agent, and avg ring and ring refer to the average time and total time the calls to each agent spend in ringing/waiting mode. This only applies to inbound calls/ingroups, as outbound calls don't measure ring time.



HOME	ANSWERED	ANS.DT.	UNANS.	UNANS.DT.	SR.	AREA	ATT.	<b>DAY</b>	HL	DOW	AGENTS	AC.DT.	OUTCOMES
<b>Report Details:</b>													
Currently viewing:	Call reports - day/date breakdown												
Report queue:	TEST_GROUP												
Report generated on:	August 28 2022, 9:38												
Campaigns/Groups considered:	Test Coverage: 97.03% (98.58% answered, 1.42% unans) Agent Based Queue for Chats: JAGINTONBCT_Chat3 Agent Based Queue for Chats: JAGINTONBCT_Chat2 JAGINTONBCT_Chat1 JAGINTONBCT_Chat4 JAGINTONBCT_Chat5 JAGINTONBCT_Chat6 JAGINTONBCT_Chat7 JAGINTONBCT_Chat8 JAGINTONBCT_Chat9 JAGINTONBCT_Chat10 JAGINTONBCT_Chat11 JAGINTONBCT_Chat12 JAGINTONBCT_Chat13 JAGINTONBCT_Chat14 JAGINTONBCT_Chat15 JAGINTONBCT_Chat16 JAGINTONBCT_Chat17 JAGINTONBCT_Chat18 JAGINTONBCT_Chat19 JAGINTONBCT_Chat20 JAGINTONBCT_Chat21 JAGINTONBCT_Chat22 JAGINTONBCT_Chat23 JAGINTONBCT_Chat24 JAGINTONBCT_Chat25 JAGINTONBCT_Chat26 JAGINTONBCT_Chat27 JAGINTONBCT_Chat28 JAGINTONBCT_Chat29 JAGINTONBCT_Chat30 JAGINTONBCT_Chat31 JAGINTONBCT_Chat32 JAGINTONBCT_Chat33 JAGINTONBCT_Chat34 JAGINTONBCT_Chat35 JAGINTONBCT_Chat36 JAGINTONBCT_Chat37 JAGINTONBCT_Chat38 JAGINTONBCT_Chat39 JAGINTONBCT_Chat40 JAGINTONBCT_Chat41 JAGINTONBCT_Chat42 JAGINTONBCT_Chat43 JAGINTONBCT_Chat44 JAGINTONBCT_Chat45 JAGINTONBCT_Chat46 JAGINTONBCT_Chat47 JAGINTONBCT_Chat48 JAGINTONBCT_Chat49 JAGINTONBCT_Chat50 JAGINTONBCT_Chat51 JAGINTONBCT_Chat52 JAGINTONBCT_Chat53 JAGINTONBCT_Chat54 JAGINTONBCT_Chat55 JAGINTONBCT_Chat56 JAGINTONBCT_Chat57 JAGINTONBCT_Chat58 JAGINTONBCT_Chat59 JAGINTONBCT_Chat60 JAGINTONBCT_Chat61 JAGINTONBCT_Chat62 JAGINTONBCT_Chat63 JAGINTONBCT_Chat64 JAGINTONBCT_Chat65 JAGINTONBCT_Chat66 JAGINTONBCT_Chat67 JAGINTONBCT_Chat68 JAGINTONBCT_Chat69 JAGINTONBCT_Chat70 JAGINTONBCT_Chat71 JAGINTONBCT_Chat72 JAGINTONBCT_Chat73 JAGINTONBCT_Chat74 JAGINTONBCT_Chat75 JAGINTONBCT_Chat76 JAGINTONBCT_Chat77 JAGINTONBCT_Chat78 JAGINTONBCT_Chat79 JAGINTONBCT_Chat80 JAGINTONBCT_Chat81 JAGINTONBCT_Chat82 JAGINTONBCT_Chat83 JAGINTONBCT_Chat84 JAGINTONBCT_Chat85 JAGINTONBCT_Chat86 JAGINTONBCT_Chat87 JAGINTONBCT_Chat88 JAGINTONBCT_Chat89 JAGINTONBCT_Chat90 JAGINTONBCT_Chat91 JAGINTONBCT_Chat92 JAGINTONBCT_Chat93 JAGINTONBCT_Chat94 JAGINTONBCT_Chat95 JAGINTONBCT_Chat96 JAGINTONBCT_Chat97 JAGINTONBCT_Chat98 JAGINTONBCT_Chat99 JAGINTONBCT_Chat100												
Period start date:	August 21 2022, 09:38												
Period end date:	August 28 2022, 09:38												
Total calls processed:	7 (6 ans / 1 unans)												
Ratio:	85.7% ans / 14.3% unans												
<input type="button" value="Search"/> <input type="button" value="List"/> <input type="button" value="CSV"/>													



#### Answered call distribution per day:

Day	Num	%	Answered calls	Avg	Min	Max	Avg Duration
2022-08-28	6	100.0%		04:36	03:00	11:57	

Export as... CSV

#### Answered call wait time per day:

Day	Num	%	Answered calls	Avg	Min	Max	Avg Duration
2022-08-28	6	100.0%		00:11	00:17	00:46	

Export as... CSV

#### Unanswered call wait time per day:

Day	Num	%	Unanswered calls	Avg	Min	Max	Avg Duration
2022-08-28	1	50.0%		00:50	00:50	00:50	

Export as... CSV

#### Sales per Day:

Day	Human ans. conv	Customer cont. conv	Sales	Human answers	Customer contacts
2022-08-28	25.0%	50.0%	1	4	2

Export as... CSV

#### Queue length per day:

Day	Avg	Min	Max	ASQPPH
2022-08-28	1.0	1	1	0.3

Export as... CSV

#### Schedule Adherence per Day:

Day	Agents	100.0%
2022-08-28	2	

Export as... CSV

#### Inclusive SLA per day (inbound and outbound):

Day	Answered	Unanswered	Num	< 5	< 10	< 15	< 20	< 30	< 40	< 50	< 60	< 70	< 80	< 90	< 100	< 110	< 120
2022-08-28	6	1	7	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%	66.7%

Export as... CSV

**Figure 66. VERM Calls per Day report**

**Answered call distribution by day** - This shows the number of answered calls within the selected report parameters broken down by day. Each date displays the number of calls answered, the percentage that were answered that day relative to the entire date range, and a bar graph representing the number of calls answered that day relative to the other dates in the report date range. Additionally, each date shows the average/minimum/maximum call lengths for each date, and another simple bar graph representing the average call length for that date relative to the other dates' average call lengths.

**Answered call wait time per day** - This shows the number of answered calls within the selected report parameters broken down by day. Each date displays the number of calls answered, the percentage that were answered that day relative to the entire date range, and a bar graph representing the number of calls answered that day relative to the other dates in the report date range. Additionally, each date shows the average/minimum/maximum wait time for each date, and another simple bar graph representing the average wait time for that date relative to the other dates' average wait times.

**Unanswered call wait time per day** - This shows the number of unanswered calls within the selected report parameters broken down by day. Each date displays the number of unanswered calls, the percentage that went unanswered that day relative to the entire date range, and a bar graph representing the number of unanswered calls that day relative to the other dates in the report date range. Additionally, each date shows the average/minimum/maximum wait time, and another simple bar graph representing the average wait time for that date relative to the other dates' average wait times.

**Sales per day** - This report gives information on sales per day. For each day within the given date range, the report gives the percentage of human answered calls (determined by the "human answered" parameter on statuses in the admin) that resulted in a sale. It also gives the percentage of customer contact calls for that day (determined by the "customer contact" parameter on statuses in the admin) that resulted in a sale. Following that is the count of sales for that date and the percentage of the total sales that came from that date, as well as a bar graph representing the number of sales relative to other date's sales in the same range. A call is determined to be a sale if the call status has its "Sale" attribute set to "Y" in the system. After that is the total of human answers and customer contacts for the date, the percent of customer contacts from the total date range that came from that date, and a bar graph representing the number of customer contacts relative to other date's customer contacts in the same range.

**Queue length per day** - This report gives information on the queue positions of calls within the report parameters. Per day, it will show the average queue position and a bar graph representing the average queue position per day relative to other dates' queue positions under the same report parameters. It will also show the minimum and maximum queue positions recorded for that date and another bar graph for the maximum queue position for that date relative to other dates. It will also show the coverage percentage (percent of calls with queue position), and the number of steps, which is the average sum of the queue positions per hour - 24 hours is used for this calculation, even for a partial day.

**Schedule Adherence per Day** - This report will show per day how many distinct agents were logged in for that day - days where there were no agents logged in are skipped. It will also show a percent which is the number of distinct agents that day against the total number of distinct agents per day for the report interval (i.e. the sum of all percentages show here should add up to 100%), and a bar graph representing the percentage.

**Inclusive SLA per day (inbound and outbound)** - This sub-report shows the number of calls answered within set intervals of wait seconds per day. By default the initial interval is 5 seconds, up to a period of 20 seconds, at which point the interval becomes 10 seconds up to 120 seconds. These values (initial interval, initial period, interval, max period) can be adjusted by running a custom report. The report shows the number of calls answered and unanswered per day (with a total of both). Then the percentage of calls answered within each shown interval for that date is displayed.



Figure 67. VERM Calls per Hour report

**Answered call distribution per hour** - This report breaks down the number of answered calls per interval (default is 30 minutes, and can be modified via the custom report form) over the hours of the day for the day or days covered by the report parameters. It will show every interval, including ones with no call activity, with the number of answered calls starting in that interval and the percentage of answered calls out of the total answered calls that were answered during that interval. Then there is a small bar graph representing the average percentage for that interval relative to the other intervals. Then the average, minimum, and maximum call lengths for calls answered during that interval are shown, with another bar graph representing the average call length relative to the average call length in all other intervals. Finally, there is a line graph tracking the answered calls and average call durations for the intervals.

**Answered call wait time per hour** - This report breaks down the number of answered calls per interval (default is 30 minutes, and can be modified via the custom report form) over the hours of the day for the day or days covered by the report parameters. It will show every interval, including ones with no call activity, with the number of answered calls starting in that interval and the percentage of answered calls out of the total answered calls that were answered during that interval. Then there is a small bar graph representing the average percentage for that interval relative to the other intervals. Then the average, minimum, and maximum wait times for calls answered during that interval are shown, with another bar graph representing the average wait time relative to the average wait time in all other intervals. Finally, there is a line graph tracking the answered calls and average wait times for answered calls for the intervals.

**Unanswered call wait time per hour** - This report breaks down the number of unanswered calls per interval (default is 30 minutes, and can be modified via the custom report form) over the hours of the day for the day or days covered by the report parameters. It will show every interval, including ones with no call activity, with the number of unanswered calls starting in that interval and the percentage of

unanswered calls out of the total unanswered calls that were unanswered during that interval. Then there is a small bar graph representing the average percentage for that interval relative to the other intervals. Then the average, minimum, and maximum wait times for unanswered calls during that interval are shown, with another bar graph representing the average wait time relative to the average wait time in all other intervals. Finally, there is a line graph tracking the unanswered calls and average wait times for unanswered calls for the intervals.

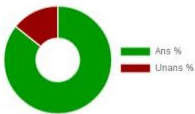
**Sales per hour** - This report gives information on sales per hour (actually, by default it is per 30-minute interval, but this can be modified via the custom report form). For each interval within the 24 hours of a day, the report gives the percentage of human answered calls (determined by the "human answered" parameter on statuses in the admin) that resulted in a sale. It also gives the percentage of customer contact calls for that interval (determined by the "customer contact" parameter on statuses in the admin) that resulted in a sale. Following that is the count of sales for that interval and the percentage of the total sales that started in that interval, as well as a bar graph representing the number of sales relative to other interval's sales in the same range. A call is determined to be a sale if the call status has its "Sale" attribute set to "Y" in the system. After that is the total of human answers and customer contacts for the interval, the percent of customer contacts from the total 24-hour range that came from that interval, and a bar graph representing the number of customer contacts relative to other interval's customer contacts in the same report range.

**Queue length per hour** - This report gives information on the queue positions of calls per hour (actually, by default it is per 30-minute interval, but this can be modified via the custom report form) within the report parameters. Per interval, it will show the average queue position and a bar graph representing the average queue position per interval relative to other dates' queue positions under the same report parameters. It will also show the minimum and maximum queue positions recorded for that date and another bar graph for the maximum queue position for that date relative to other dates. It will also show the coverage percentage (percent of calls with queue position), and the number of steps, which is the average sum of the queue positions per interval divided by 24, for the hours in the day.

**Schedule Adherence per hour** - This report will show per interval (default is 30 minutes, and can be modified via the custom report form) how many distinct agents were logged in for that interval - intervals where there were no agents logged in are still reported on. It will also show a percent which is the number of distinct agents logging activity during that interval against the total number of distinct agents per interval for the report range (i.e. the sum of all percentages show here should add up to 100%), and a bar graph representing the percentage.

**Inclusive SLA per hour (inbound and outbound)** - This sub-report shows the number of calls answered within set intervals of wait seconds per hour (actually, by default it is per 30-minute interval, but this can be modified via the custom report form). By default the initial wait time interval is 5 seconds, up to a period of 20 seconds, at which point the wait time interval becomes 10 seconds up to 120 seconds. These values (initial interval, initial period, interval, max period) can be adjusted by running a custom report. The report shows the number of calls answered and unanswered per interval (with a total of both). Then the percentage of calls answered within each shown wait time interval for that hour/interval is displayed.

HOME	ANSWERED	ANS.DT.	UNANS.	UNANS.DT.	IVR	AREA	ATT.	DAY	HR.	DOW	AGENTS	AG.DT.	OUTCOMES
<b>Report Details:</b>													
Currently viewing:	Call reports - day-of-week breakdown												
Report queue:	TEST_GROUP												
Report generated on:	August 28 2022, 9:39												
Campaigns/ingroups considered: ?	Test Campaign N [TESTCAMP] Multiple testing [AGENTDIRECT_E3] Agent Direct Queue for Chats [AGENTDIRECT_CHAT] Agent Direct Queue for Chats [AGENTDIRECT_CHAT2] AGENTDIRECT 1 [AGENTDIRECT1] Fxstl support After Hours [EXTEL_AH_SUPPORT] Fxstl inbound [EXTEL_INBOUND] Fxstl sales call [EXTEL_SALE] Fxstl support level 2 [EXTEL_SUPPORT2] Fxstl VicHost Sales [EXTEL_VICHOST_SALE]												
Period start date: ?	August 21 2022, 09:39												
Period end date: ?	August 28 2022, 09:39												
Total calls processed: ?	7 (6 ans / 1 unans)												
Ratio: ?	85.7% ans / 14.3% unans												
	<input type="button" value="Search"/> ?												
	<input type="button" value="Link"/> <input type="button" value="CSV"/>												



**Answered call distribution per day of week: ?**



**Figure 68. VERM Calls per Day of Week report**

**Answered call distribution per day of week** - This shows the number of answered calls within the selected report parameters broken down by day of the week. Each day displays the number of calls answered, the percentage that were answered that day relative to the entire report date range, and a bar graph representing the number of calls answered that day relative to the other days covered by the report date range. Additionally, each day shows the average/minimum/maximum call lengths for each day, and another simple bar graph representing the average call length for that day relative to the other days' average call lengths.

**Answered call wait time per day of week** - This shows the number of answered calls within the selected report parameters broken down by day of the week. Each day displays the number of calls answered, the percentage that were answered that day relative to the entire report date range, and a bar graph representing the number of calls answered that day relative to the other days in the report date range. Additionally, each day shows the average/minimum/maximum wait time, and another simple bar graph representing the average wait time for that day relative to the other days' average wait times.

**Unanswered call wait time per day of week** - This shows the number of unanswered calls within the selected report parameters broken down by day of the week. Each day displays the number of

unanswered calls, the percentage that went unanswered that day relative to the entire report date range, and a bar graph representing the number of unanswered calls that day relative to the other days in the report date range. Additionally, each day shows the average/minimum/maximum wait time, and another simple bar graph representing the average wait time for that day relative to the other days' average wait times.

**Sales per day of week** - This report gives information on sales per day of week. For each day within the given date range, the report gives the percentage of human answered calls (determined by the "human answered" parameter on statuses in the admin) that resulted in a sale. It also gives the percentage of customer contact calls for that day (determined by the "customer contact" parameter on statuses in the admin) that resulted in a sale. Following that is the count of sales for that day and the percentage of the total sales that were made on that day, as well as a bar graph representing the number of sales relative to other day's sales in the same range. A call is determined to be a sale if the call status has its "Sale" attribute set to "Y" in the system. After that is the total of human answers and customer contacts for the day, the percent of customer contacts from the total date range that came from that day, and a bar graph representing the number of customer contacts relative to other day's customer contacts in the same range.

**Queue length per day of week** - This report gives information on the queue positions of calls within the report parameters per day of week. It will show the average queue position and a bar graph representing the average queue position per day of week relative to other days' queue positions under the same report parameters. It will also show the minimum and maximum queue positions recorded for that day of the week and another bar graph for the maximum queue position for that day relative to other days. It will also show the coverage percentage (percent of calls with queue position), and the number of steps, which is the average sum of the queue positions per hour - 24 hours is used for this calculation, even for a partial day.

**Schedule Adherence by day of week** - This report will show per day of week how many distinct agents were logged in for that day - days where there were no agents logged in are skipped. It will also show a percent which is the number of distinct agents that day against the total number of distinct agents per day of week for the report interval (i.e. the sum of all percentages show here should add up to 100%), and a bar graph representing the percentage.

**Inclusive SLA by day of week (inbound and outbound)** - This sub-report shows the number of calls answered within set intervals of wait seconds per day of week. By default the initial interval is 5 seconds, up to a period of 20 seconds, at which point the interval becomes 10 seconds up to 120 seconds. These values (initial interval, initial period, interval, max period) can be adjusted by running a custom report. The report shows the number of calls answered and unanswered per day of week (with a total of both). Then the percentage of calls answered within each shown interval for that date is displayed.

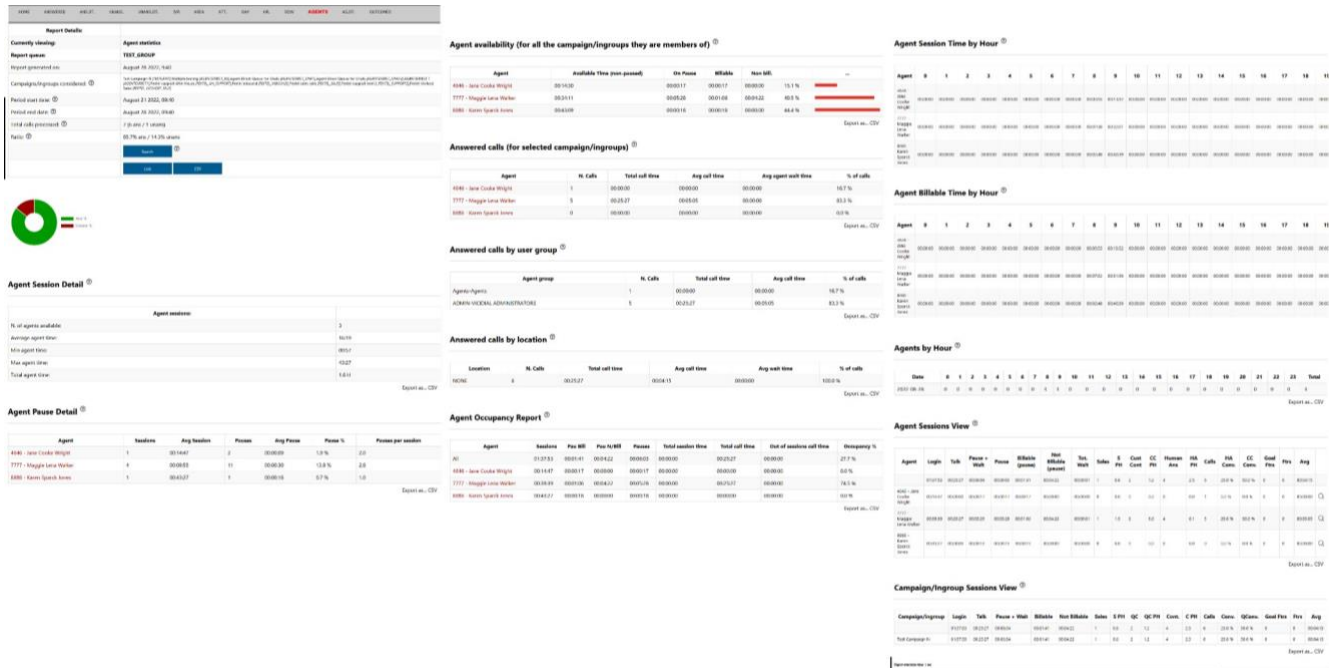


Figure 69. VERM Agents report

**Agent Session Detail** - This is a summary report showing how many distinct agents were logged in under the report parameters, the average length of their login sessions, the length of the shortest and longest sessions, and the total amount of login time expressed as hours as a floating decimal number. All statistics for this report come from the inbound call log\_agent\_log table

**Agent Pause Detail** - This report shows session and pause detail per agent, for agent log records matching the report parameters. It will show each agent, how many sessions (i.e. instances where they logged into the system) they accrued during the date range in the report parameters, the average length of their sessions. Then it will show the total number of times they went on pause, the length of the average pause session, the percentage of their session time they spent being paused, and the average number of times they were paused per session. Pauses are counted as the number of records in the agent log table where the length of the pause\_sec column is greater than zero. You can click on the name of the agent to get detailed information on the agent's activities.

**Agent availability (for all the campaigns/ingroups they are member of)** - This report details the available time of agents matching the report parameters, which is the time they are logged in and not paused. It will show each agent, the amount of time they spent active/available, the amount of time they were paused, and the amount of pause time that is billable and non-billable. Pause time is determined to be billable by taking the pause code from the agent log record and checking if the code is marked as "billable" in the inbound call log admin (if the pause code is campaign-specific, it is checked for that campaign). Then there is a column for the percentage representing how much each agent's available time takes up out of the sum total of available time shown in this report. Then there is a bar chart representing the agent's availability relative to the other agents. You can click on the name of the agent to get detailed information on the agent's activities.

**Answered calls (for selected campaigns/ingroups)** - This report shows data regarding answered calls, broken down by agent, for agent log records matching the report parameters. For each agent, the

number of calls they answered is counted - counted calls come from records for that agent in the agent log table where the records have lead IDs, indicating a call. It also shows total call time (sum of talk\_sec values from the agent log table for records with calls (lead\_id is not null)), the average call time, the average amount of time the agent spends waiting (average wait\_sec from the agent log table for records involving calls (lead\_id is not null)). The final column shows what percentage of the total answered calls were fielded by the agent. You can click on the name of the agent to get detailed information on the agent's activities.

**Answered calls by user group** - This report breaks down the number of answered calls by user group. It shows each user group that answered calls in the agent\_log table for records matching the report parameters, the number of calls that were fielded by each user group, the total amount of time spent in call per user group (talk\_sec from agent log), the average call time for that user group, and the percentage of the total calls that were answered by this user group.

**Answered calls by location** - This report breaks down the number of answered calls by location, which is a parameter on the user account. The report shows all distinct user locations based on the users that show answered calls under the report parameters, followed by the total time spent in call (talk\_sec from agent log for records where lead\_id is not null), average time spent in call, average wait time leading up to a call (wait\_sec from agent log for records where lead\_id is not null), and the percentage of the total calls that were answered by this location.

**Agent Occupancy Report** - This report tells how active/occupied agents were during the login sessions covered by the report parameters. It will show the total time agents were logged in, both in total along with per individual agent. It will also show total time spent in pause, broken down into billable and non-billable time. Whether or not time is billable is determined by the "billable" setting on pause codes under each campaign. Additionally, system statuses like 'BLANK', 'LOGIN', and 'LAGGED' are counted as billable ('null' pause codes are not billable for this report. It's counted as billable in most other reports). It will also show the total time spent in call and from the call/pause/session times, the occupancy percentage will be calculated. This is the total talk time divided by the total session time minus the total pause time.

**Agent Session Time by Hour** - For the given report parameters, this report will show each individual agent's total time in session (logged in) per hour of the day, with a total time at the end.

**Agent Billable Time by Hour** - For the given in the report parameters, this report will show each individual agent's total billable time per hour of the day, with a total time at the end. The report arrives at this figure by taking the agent's total session time, then subtracting the time that is considered non-billable. Non-billable time is the pause\_sec from the agent logs, where the pause code (sub\_status column) is not and system pause code of 'BLANK', 'LOGIN', 'LAGGED', or null NOR is it a billable pause code for the campaign\_id for the agent log record.

**Agents by Hour** - This is a very basic report that shows how many distinct agents were logged in per hour of the day for every date covered by the report parameters.

**Agent Sessions View** - This is a comprehensive report of detailed agent information for all agents logged in during the date range covered by the report parameters. The first record is the sum of all statistics, followed by each individual agent's statistics. The report gives the total login time, total talk time, total idle (pause+wait) time, total "idle no wait" (pause) time, and total billable and non-billable

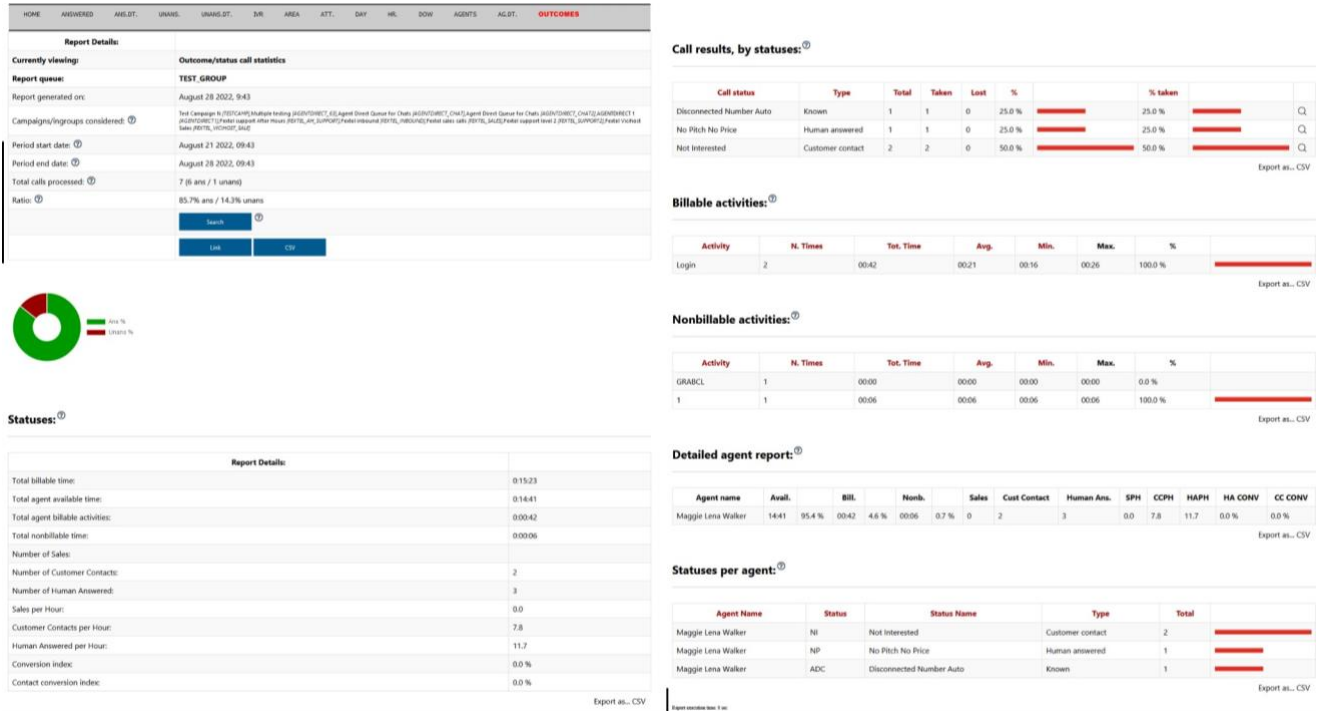


pause time. Whether or not time is billable is determined by the "billable" setting on pause codes under each campaign. Additionally, system statuses like 'BLANK', 'LOGIN', and 'LAGGED' are counted as billable ('null' pause codes are not billable for this report. It's counted as billable in most other reports). The report also gives total wait (wait\_sec) time. The report counts the total number of sales, customer contacts, and human-answered calls, and the same counts on a per-hour basis against the presence time ("sale", "customer contact", and "human answered" are status attributes that can be set on campaign or system statuses). Then the report shows a count on offered/answered calls - these are the same thing for this report, which is the total calls handled by agents. Then there is the human answered and customer contact conversion rate, which is the number of sales divided by the respective customer contact and human answered counts. Finally, the report gives the average talk time per call.

**Campaign/Ingroup Sessions View** - This is a comprehensive report of detailed campaign/ingroup information for all campaigns/ingroups where agents were logged in during the date range covered by the report parameters. The first record is the sum of all statistics, followed by each individual campaign/ingroup statistics. The report gives the total login time, total talk time, total idle (pause+wait) time, and total billable and non-billable pause time. Whether or not time is billable is determined by the "billable" setting on pause codes under each campaign. Additionally, system statuses like 'BLANK', 'LOGIN', and 'LAGGED' are counted as billable ('null' pause codes are not billable for this report. It's counted as billable in most other reports). The report counts the total number of sales, human-answered, and customer-contact calls, and the same counts on a per-hour basis against the presence time ("sale", "customer contact", and "human answered" are status attributes that can be set on campaign or system statuses). Then the report shows a count on offered/answered calls - these are the same thing for this report, which is the total calls handled by agents. Then there is the human answered and customer contact conversion rate, which is the number of sales divided by the respective customer contact and human answered counts. Finally, the report gives the average talk time per call.

**Detail of agent sessions** - This report will display every agent session that meets the report parameters (date range/agents/queues/etc), ordered by agent ID and then by start date/time of the session. Each row shows the agent, the time the session started and ended and the duration of said session. It will show what phone extension the agent used while logged in, and if there is a special reason their session terminated it will be displayed. For example, "MGR LOGOUT" means a manager manually logged the agent out, and "EOD LOGOUT" means the agent was shown to be logged in at the very end of a day. Additionally, it will show how many times the agent was paused - this is determined by the number of records in the agent log table for that agent during the given session where the pause\_sec value is greater than zero. The total amount of time the agent spent in pause (sum of the non-zero pause\_sec values) is shown. Finally, the server the agent was logged into is displayed.

**Detail of agent pauses** - This report will show every pause occurrence in the agent log table that meets the report parameters (date range, agents, queues, etc), sorted by start date/time. It will show the agent who paused, pause code (if any) and name of the pause code (if any). 'BLANK' and null pause codes in the agent log are represented by a "-" here. It will show if the pause interval was billable or non-billable (B/NB) and payable or non-payable (P/NP) as a single code of up to four characters, along with whether the interval is billable. The start/end time of the pause interval and its duration will also be displayed.



**Figure 70. VERM Outcome Statuses report**

**Statuses** - This report will give summary stats of matching the report parameters. It will show total times broken down into billable/nonbillable/available, and total statuses based on categories of sale, human answered, and customer contact (defined in the admin). Additionally, these status categories will also have a per-hour count based on their quantities against the "Total billable time".

**Call results, by statuses** - This report shows a breakdown of every status that was encountered under the report parameters, initially sorted by call status. Each record will show the status name and the call type of that status. "Call type" is the most specific type fitting the status. Blank statuses are "none", subsequent ones are "Unknown" if the status is not found in the system, "Known" if the status IS in the system but not a human answer, customer contact, or sale. If the status is human answered, customer contact, and/or sale the call type prioritization is sale >> customer contact >> human answered. It will also show the call count per status, the percent of this count against the total number of calls with statuses, and a simple bar graph representing the number of calls relative to the total number of calls with statuses. Each status row also provides the option to see the details of each call having that status via clicking on the magnifying glass icon at the end of the row.

**Billable activities** - This report breaks down the individual billable activities that occurred under the report parameters. It shows the number of times each activity occurred, the total time spent in each activity, the average/minimum/maximum amount of time spent in each activity within the report parameters, and the percent of the time that billable activity accrued relative to the other billable activities, and a simple bar graph representing that percentage.

**Nonbillable activities** - This report breaks down the individual nonbillable activities that occurred under the report parameters. It shows the number of times each activity occurred, the total time spent in each activity, the average/minimum/maximum amount of time spent in each activity within the

report parameters, and the percent of the time that nonbillable activity accrued relative to the other nonbillable activities, and a simple bar graph representing that percentage.

**Detailed agent report** - This report details agent time and statuses. It will show every agent having status-related activity under the report parameters. It displays their total time available (nonpause time), billable pause time, and nonbillable pause time along with the percentage each amount of time is of their total time. Additionally, there are counts of sales/customer contacts/human answered statuses. Each status category is given a per-hour calculation relative to their billable time (this is defined as available time plus billable pause time), and the conversion rates of their human answered and customer contact calls (this is the number of sales divided by each of the two categories).

**Statuses per agent** - This report breaks down counts of statuses per agent, ordered by agent and then call type. "Call type" is the most specific type fitting the status. Blank statuses are "none", subsequent ones are "Unknown" if the status is not found in the system, "Known" if the status IS in the system but not a human answer, customer contact, or sale. If the status is human answered, customer contact, and/or sale the call type prioritization is sale >> customer contact >> human answered. A total of each type of status per agent and a bar graph representing the total relative to the other totals is also given.

**Call Detail:** [X]

Call details ⓘ IVR events: 2 ⓘ

<b>Asterisk Call ID:</b>	Y82809014300 [REDACTED]
<b>Date and time:</b>	08/28 - 09:01:33
<b>Campaign/ingroup:</b>	Fextel inbound [FEXTEL_INBOUND]
<b>Caller ID:</b>	727 [REDACTED]
<b>Handled by:</b>	Maggie Lena Walker
<b>Duration:</b>	666.00 sec
<b>Time in IVR before queueing:</b>	00:10
<b>Waiting time:</b>	46.00 sec
<b>Original position:</b>	# 1
<b>Disconnection cause:</b>	AGENT
<b>Transferred to:</b>	
<b>Attempts:</b>	1
<b>Status code:</b>	SALE: Sale Made
<b>DNIS:</b>	727 [REDACTED] - FEXTEL inbound VICIHOST support 1
<b>IVR selection:</b>	FEXTEL_inbound,0

[20220828-090229\\_727\\_\[REDACTED\].7777](#)

**Figure 71. VERM Call Detail report**

**Call detail** - "Call detail" is the default information displayed in this window when it loads. It provides some basic information on the call (phone number, agent, length of the call, recording link), but also additional detailed information such as time spent waiting and time spent in IVR, the IVR call path, and the number that was dialed to initiate this call (i.e. the inbound DID).

**IVR events** - This is a subset of detailed information for the IVR path of the specific selected call, wherein any IVR events passed during a call are displayed. The time of each event, the amount of time spent at each event, and the actual event is displayed.

**Statuses detail** - This displays every call from the agent log table within the report parameters of a specific status, selected from the statuses detail report. Clicking on the magnifying glass by any call will give even more detailed information about that specific call.

**Agent detail** - This displays a summary of a single agent's time/activity within the report parameters. Beneath that is a detailed breakdown of every session and pause interval within each session logged by the agent. Each pause record shows the time spent on pause, the explanation of the pause activity (i.e. the name of the pause code from the agent log, if available), whether the pause interval is billable or

payable, and the start and end time of the pause interval. Time spent in call is NOT detailed here.

**Custom report analysis:**

The screenshot shows the 'Custom report analysis' configuration page. At the top, there are three buttons: 'BACK TO HOME', 'RUN CUSTOM REPORT', and 'REALTIME REPORT', along with a refresh icon. The main content is organized into four sections:

- Report Details:** Includes fields for Queue, Report, Time period, Call start date, and Call end date.
- Preferences:** Includes dropdown menus for Hourly slot (minutes), SLA initial period, SLA initial interval, SLA max period, and SLA interval.
- Call filtering criteria:** Includes fields for Agent, Supervisor/Team, Location, Agent Group, Outcome, Asterisk call-id, Caller, Wait duration, Call duration, Disconnection cause, Enter position, Number of attempts (call count), DID, IVR choice, and Server.
- Non-contiguous time:** Includes a dropdown for Day of week and a range selector for time intervals.

At the bottom, there are the same three navigation buttons and a refresh icon as at the top.

**Figure 72. VERM Custom report**

**Queue** - A queue is a collection of campaigns and/or ingroups. These are built in the admin. This dropdown will display any active queue that is allowed to be viewed under the current user's user group.

**Report** - The individual subreports that comprise VERM are displayed here. By default the first

subreport displayed is ANSWERED, but selecting a report here will start the user at that specific report instead.

**Time period** - This is a date range relative to the current date and time. Selecting an option from this and running the custom report will override the "call start/end date" values.

**Hourly slot (minutes)** - This is a parameter used in the "HR" report and is the interval in minutes in which call counts are broken down into.

**SLA initial period** - This parameter is used in SLA sub-reports in the Un/Answered reports. This refers to an initial time period in seconds over which call counts are broken down into, in intervals given by the "SLA initial interval" parameter.

**SLA initial interval** - This parameter is used in SLA sub-reports in the Un/Answered reports. This refers to the interval in seconds in which call counts are broken into within the period given by the "SLA initial period" parameter.

**SLA max period** - This parameter is used in SLA sub-reports in the Un/Answered reports. This refers to the maximum time period in seconds in which call counts are generated, in intervals given by the "SLA interval" parameter, for any intervals/counts beyond the values given in the "SLA initial period" and "SLA initial interval" parameters.

**SLA interval** - This parameter is used in SLA sub-reports in the Un/Answered reports. This refers to the time interval in seconds in which call counts are generated, up to the time in seconds given by the "SLA max period" parameter, for any intervals/counts beyond the values given in the "SLA initial period" and "SLA initial interval" parameters.

**Agent** - This will limit the report results to a particular agent. What agents the report user can select is determined by their account permissions.

**Supervisor/Team** - This will filter reports to only include agents belonging to a particular supervisor/team, which is the value indicated in the "VERM Secondary User Group" setting on the user modification page in the admin.

**Location** - This will limit report results to a particular location, which is set via the admin in the user's "user location" parameter. Locations are limited to the distinct locations found on the agents the report user is allowed to view.

**Agent Group** - This will limit report results to a particular user group. What user groups the report user can select is determined by their account permissions.

**Status** - This will limit report results to a particular status/disposition.

**Asterisk call-id** - If the report user can produce the caller code from a call in the outbound call log\_extended table, it can be entered here. It will limit the report results considerably, of course.

**Caller** - This field is for entering a phone number to limit report results to, either as the number to which an outbound call was placed or as the number an inbound call came in from.

**Wait duration** - These fields can be used to filter report results to phone calls that were answered within a particular number of seconds. If the range does not include zero seconds, no outbound calls will be in the results as outbound calls do not have wait time.

**Call duration** - These fields can be used to filter report results to phone calls that lasted a particular number of seconds within the range given by these fields.

**Disconnection cause** - The report user can use this dropdown menu to filter report results so that only calls that terminated in a particular way (per the inbound or outbound call logs) are considered.

**Enter position** - This will limit the report results to calls that were logged with a queue position within the range entered in these fields. NOTE: All outbound calls are considered to have a position of '1', so if '1' is not in the range entered by the report user then there will be no outbound calls in the report results.

**Number of attempts** - The report user can limit report results to leads that were attempted a number of times between the range entered in these fields. This is based on the called\_count value in the outbound and inbound log records.

**DID** - Entering a value in this field will filter report results to be only inbound calls that reached the queue via the DID in this field. This will, of course, mean the report results will be for inbound calls only.

**IVR choice** - This filter will limit report results to calls that passed through an IVR and show in the logs a choice containing the string entered in this field.

**Server** - This filter will limit report results to calls that occurred on a particular server per the extended call logs.

**Day of week** - As the name suggests, selecting an option from this menu will filter the report results to calls that occurred on a particular day (or days) of the week.

**Between** - Entering a time range in this fields will filter the report results to calls that only occurred during the time of day covered by said time range.





Figure 73. Inbound Report

## INBOUND REPORT

The Inbound Report has many of the same parts as the standard Outbound Calling report except it is only for inbound groups, not for outbound calling. At the top of the Inbound report you will see a breakdown of the basic call handling stats across the multiple in-groups that you have selected to run the report on. Another difference from the outbound report is that the Inbound Report also will show the Total and Average Queue time for calls, or how long the callers had to wait before they either hung up the phone or were sent to an agent.

Next are custom indicators, which will show you different percentages for different inbound metrics like Answered calls out of total calls.

The next different inbound section will show you the breakdown in seconds of the hold and drop calls as to how long they were holding before they were answered or dropped.

The call answered time and percent breakdown will show you number of calls and percentage of calls broken down across the same time frame as the previous section.

Below the Custom Status breakdown is a chart showing tallies of the initial queue position of all calls in the selected in-groups when they came into the in-group queue. In the Figure above, this shows that five of the callers were fourth in line when they first entered the queue.



The last different inbound section is at the bottom and it is also using the same time breakdown as the sections I just mentioned, except it is a breakdown in 15 minute increments of the answered time of calls in the selected in-groups.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

There is also a “v2” version of this report that was designed to work across multiple days while restricting the time range to a range of time across each day of the reporting date range.



## ***Inbound Report by DID***

Almost identical to the Inbound report. However this report displays the number of calls, and drops; along with the drop percentage and the number of calls received from an IVR (call menu). Below that, it further breaks down average call length, hold time, and the total transferred to an IVR. This shows various answered, dropped and queued data.

Call hold, drop, and answered time breakdowns show in the number of calls in the time interval each were handled (in seconds). This also shows answer percentages.

Next, is a breakdown of the calls by status (including custom statuses). Then there are call hangup reasons, with totals.

The call status stats show the status, its description, category, number of calls, total time, average time, and call per hour. The custom status category merely shows the custom status, description, and total calls.

Initial queue position displays a chart showing tallies of the initial queue position of all calls in the selected in-groups when they came into the in-group queue.

Agent stats shows a break down of each agent, their total calls, total call time, and average call time.

Below the agent stats, is a chart show the entire time agents were logged in, and the total calls taken along with drops, (separated in 15 minute intervals) during that time.

The last report is the Call answered breakdown, displaying how quickly calls were answered, by 15 minute intervals, throughout a 24 hour day. The answer time is divided in set increments of seconds, and shows the total calls answered inside of those criteria.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

**NOTE:** This report will take longer to run than the standard Inbound Report, especially on systems with a large number of daily inbound calls.



## INBOUND/CLOSER SERVICE LEVEL REPORT

The inbound service level report is a report that has some of the information available in the standard inbound report, except it is in a different format. It also includes some new information.

This report can show you a breakdown per day of the basic call statistics for the selected in-group. You will also see much more information on hold times broken down across 15 minute increments in the two bottom sections of this report. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

**Figure 76. Inbound Summary Hourly Report**

**Inbound Summary Hourly Report** [?](#)

Date Range: 2016-11-25 to 2016-11-25

Call Time: 9am-5pm - default 9am to 5pm calling

Inbound Groups:
 

- AGENTDIRECT - Single Agent Direct Queue
- AGENTDIRECT\_CHAT - Agent Direct Queue for Chats
- SALESLINE - Sales Inbound Line
- TEST\_CHAT - test chat group
- TEST\_EMAIL - Test email

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Display as: TEXT

Exclude Outbound Drop Groups: NO

Search archived data

Inbound Summary Hourly Report: |T0| 2012-04-27 14:04:39

----- MULTI-GROUP BREAKDOWN: -----

IN-GROUP	TOTAL CALLS	TOTAL ANSWER	TOTAL TALK	AVERAGE TALK	TOTAL QUEUE TIME	AVERAGE QUEUE TIME	MAXIMUM QUEUE TIME	TOTAL ABANDON
Inbound	255	248	22:40:42	5:29	2:13	0:01	0:25	7
<b>TOTALS In-Groups: 1</b>	<b>255</b>	<b>248</b>	<b>22:40:42</b>	<b>5:29</b>	<b>2:13</b>	<b>0:01</b>	<b>0:25</b>	<b>7</b>

----- HOURLY BREAKDOWN: -----

HOURLY	TOTAL CALLS	TOTAL ANSWER	TOTAL TALK	AVERAGE TALK	TOTAL QUEUE TIME	AVERAGE QUEUE TIME	MAXIMUM QUEUE TIME	TOTAL ABANDON
9	0	0	0:00	0:00	0:00	0:00	0:00	0
10	32	32	3:17:44	6:11	0:01	0:00	0:01	0
11	41	38	2:39:53	4:12	0:22	0:01	0:19	3
12	22	21	2:28:52	7:05	0:09	0:00	0:09	1
13	51	50	4:55:02	5:54	0:27	0:01	0:16	1
14	19	19	2:28:42	7:50	0:01	0:00	0:01	0
15	22	22	1:45:13	4:47	0:00	0:00	0:00	0
16	21	21	1:20:06	3:49	0:16	0:01	0:15	0
17	28	27	2:02:40	4:33	0:13	0:00	0:12	1
18	19	18	1:42:27	5:42	0:44	0:02	0:25	1
19	0	0	0:00	0:00	0:00	0:00	0:00	0
20	0	0	0:00	0:00	0:00	0:00	0:00	0
21	0	0	0:00	0:00	0:00	0:00	0:00	0
<b>TOTALS</b>	<b>255</b>	<b>248</b>	<b>22:40:42</b>	<b>5:29</b>	<b>2:13</b>	<b>0:01</b>	<b>0:25</b>	<b>7</b>

Run Time: 0 seconds|H

## INBOUND SUMMARY HOURLY REPORT

The Inbound Summary Hourly Report gives you an hour-by-hour breakdown of the call activity of a selected group of in-groups that can be filtered by a call time scheme. At the top you will see a breakdown per in-group of standard statistics for inbound call handling. Below that is a breakdown per in-group and per hour of the same statistics shown above. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

Vicidial Reports Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin

**Inbound Daily Report** ?

2016-11-25 to 2016-11-25

Show hourly results  
 Show disposition statuses  
 Ignore after-hours calls  
 Search archived data

--ALL INGROUPS--  
 AGENTDIRECT - Single Agent Direct Queue  
 AGENTDIRECT\_CHAT - Agent Direct Queue for Chats  
 SALESLINE - Sales Inbound Line  
 TEST\_CHAT - test chat group

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Inbound Daily Report 2012-04-27 14:12:35  
 Selected in-group: INBOUND  
 Time range 1 days: 2012-04-27 00:00:00 to 2012-04-27 23:59:59 for ALL shift

SHIFT	TOTAL CALLS OFFERED	TOTAL CALLS ANSWERED	TOTAL CALLS ABANDONED	TOTAL ABANDON PERCENT	AUG ABANDON TIME	AUG ANSWER SPEED	AUG TALK TIME	TOTAL TALK TIME	TOTAL WRAP TIME	TOTAL CALL TIME
2012-04-27 00:00:00 - 2012-04-27 23:59:59	45	39	6	13.33%	00:01	00:21	02:39	1:43:12	0:09:45	1:52:57
WTD	45	39	6	13.33%	00:01	00:21	02:39	1:43:12	0:09:45	1:52:57
MTD	45	39	6	13.33%	00:01	00:21	02:39	1:43:12	0:09:45	1:52:57
QTD	45	39	6	13.33%	00:01	00:21	02:39	1:43:12	0:09:45	1:52:57
TOTALS	45	39	6	13.33%	00:01	00:00	02:39	1:43:12	0:09:45	1:52:57

Run Time: 0 seconds

**Figure 77. Inbound Daily Report**

***INBOUND DAILY REPORT***

This report allows you to view 1 or several days worth of inbound information for a single campaign, and compare it against the week-to-date, month-to-date, and quarter-to-date statistics. This compares total calls offered, answered, and abandoned, as well as average abandon, answer speed, and talk time. This report also includes total talk, wrap, and call time. This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

**Inbound DID Report** [?](#)

2016-11-25 to 2016-11-25

9998887777 - test DID  
default - Default DID

ALL TEXT

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Inbound DID Report 2012-04-27 14:09:27

Time range 2 days: 2012-04-26 00:00:00 to 2012-04-27 23:59:59

DID Summary:

DID	DESCRIPTION	ROUTE	CALLS
800	Toll Free	IM_GROUP	151
TOTALS			151

Date Summary:

SHIFT	DATE-TIME RANGE	CALLS
	2012-04-26 00:00:00 - 2012-04-26 23:59:59	107
	2012-04-27 00:00:00 - 2012-04-27 23:59:59	44
TOTALS		151

----- HOLD TIME, CALL AND DROP STATS

GRAPH IN 15 MINUTE INCREMENTS OF AVERAGE HOLD TIME FOR CALLS TAKEN INTO THIS IN-GROUP

TIME	CALLS ANSWERED	TOTAL
00:00-00:15	1	1
00:15-00:30		
00:30-00:45		
00:45-01:00		
01:00-01:15		
01:15-01:30		
01:30-01:45		
01:45-02:00	1	1
02:00-02:15		
02:15-02:30	1	1
02:30-02:45		
02:45-03:00		
03:00-03:15		
03:15-03:30		
03:30-03:45		
03:45-04:00		
04:00-04:15		
04:15-04:30		
04:30-04:45		
04:45-05:00		
05:00-05:15		
05:15-05:30	2	2
05:30-05:45		
05:45-06:00		
06:00-06:15		
06:15-06:30		
06:30-06:45		
06:45-07:00		
07:00-07:15		
07:15-07:30		
07:30-07:45		
07:45-08:00		
08:00-08:15		
08:15-08:30	1	1
08:30-08:45		
08:45-09:00	2	2
09:00-09:15	4	4
09:15-09:30	3	3
09:30-09:45	5	5
09:45-10:00	2	2
10:00-10:15	6	6
10:15-10:30	8	8
10:30-10:45	4	4
10:45-11:00	2	2
11:00-11:15	2	2
11:15-11:30	5	5
11:30-11:45	5	5
11:45-12:00	3	3
12:00-12:15	1	1
12:15-12:30	7	7
12:30-12:45	6	6
12:45-13:00	7	7
13:00-13:15	11	11
13:15-13:30	2	2
13:30-13:45	2	2
13:45-14:00	2	2
14:00-14:15	2	2
14:15-14:30	1	1
14:30-14:45	2	2
14:45-15:00	2	2
15:00-15:15	2	2
15:15-15:30	2	2
15:30-15:45	2	2
15:45-16:00	2	2
16:00-16:15	1	1
16:15-16:30		
16:30-16:45		
16:45-17:00	2	2
17:00-17:15	2	2
17:15-17:30	2	2
17:30-17:45	2	2
17:45-18:00	2	2
18:00-18:15	4	4
18:15-18:30		
18:30-18:45		
18:45-19:00	1	1
19:00-19:15	2	2
19:15-19:30	1	1
19:30-19:45		
19:45-20:00	1	1
20:00-20:15	2	2
20:15-20:30		
20:30-20:45		
20:45-21:00		
21:00-21:15		
21:15-21:30		
21:30-21:45	1	1
21:45-22:00	1	1
22:00-22:15		
22:15-22:30		
22:30-22:45		
22:45-23:00		
23:00-23:15		
23:15-23:30		
23:30-23:45		
23:45-00:00		
TOTAL	151	151

Run Time: 0 seconds

Figure 78. Inbound DID Report



## ***INBOUND DID REPORT***

The Inbound DID Report shows the statistics for calls passing through the Dialer DID routing process. The first section of the report shows the breakdown per DID of how many calls came in during the specified date period. The next section is a day-by-day breakdown of the total calls for the selected DIDs. The last section is a 15-minute increment ASCII graph of the inbound call activity for those DIDs that shows when the calls came in during the day. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link. Figure 51. Inbound IVR(Call Menu) Report

This report breaks down activity for a DID or a list of DIDs over a given time interval.

CURRENT ROUTE = Where the DID is currently directed when a call reaches it.

CALLS = Number of calls the DIDs/servers/time frames (depending on which sub-report you are viewing) received during the specific date range.

LOST = Number of calls that were supposed to be routed to an INGROUPE/AGENT/CALLMENU but do not show log records in the appropriate log tables, suggesting the caller hung up.

TRANSFERS = Number of calls sent to PHONE/VOICEMAIL/EXTEN during the specific date range.

ROUTED = Number of calls sent to INGROUPE/AGENT/CALLMENU with corresponding log records showing outcome.



**Figure 79. Inbound DID Summary Report**

### ***INBOUND DID SUMMARY REPORT***

The Inbound DID Summary Report will provide counts for the number of calls and the number of minutes from each DID that is selected to run the report. Some other columns of information for each DID are taken from the DID entry, from the description of the DID to the DID custom fields.

This report breaks down activity for a DID or a list of DIDs over a given time interval.

CALLS= Number of calls the DIDs/servers/time frames (depending on which sub-report you are viewing) received during the specific date range.

MINUTES = Cumulative length of time of all calls made to the DID.

ROUTE = Where the DID is currently directed when a call reaches it.

## Agent DID Report ?

2019-03-19 to 2019-03-21

+17275777470 - Updated test API DID now  
+17778889999 - plus one test  
00000 - test  
0102 - something  
07042909629 - trials 2

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Inbound DID Report 2019-03-21 11:58:18

Time range 3 days: 2019-03-19 00:00:00 to 2019-03-21 23:59:59

2019-03-19

Agent ID	Full Name	Inbound 3	TOTAL
6666	Admin user	1	1

Week of 2019-03-19 thru 2019-03-21

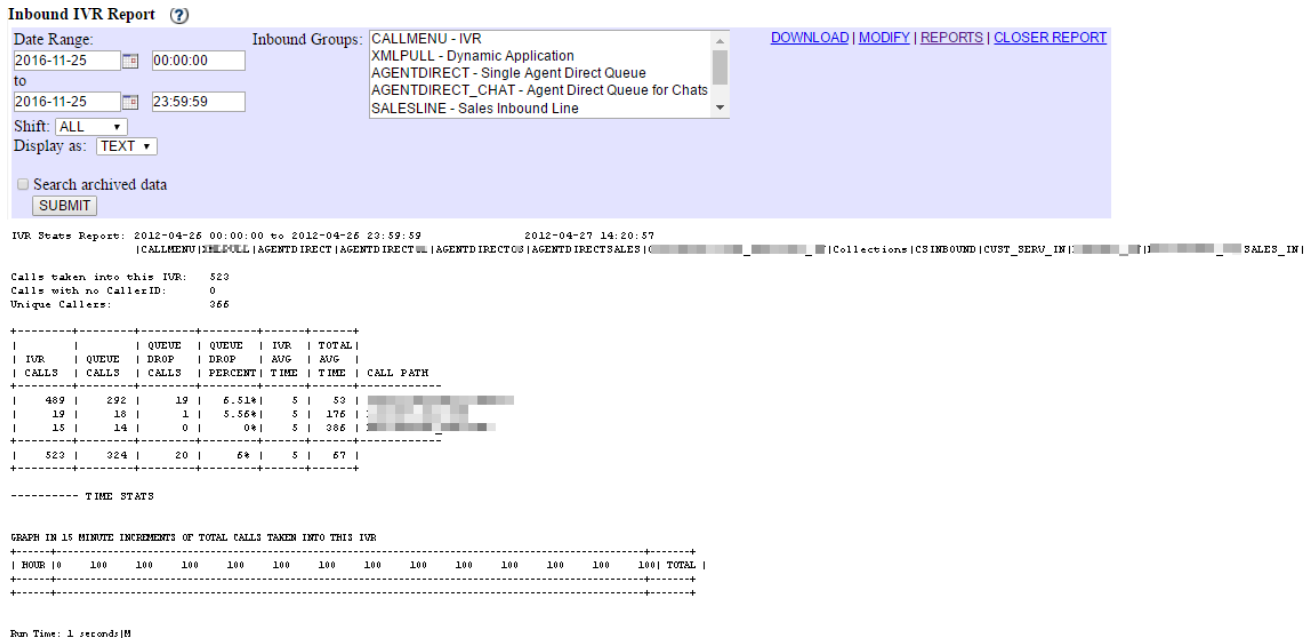
Agent ID	Full Name	Inbound 3	TOTAL
6666	Admin user	1	1

Run Time: 0 seconds|M

**Figure 80. Inbound Agent DID Report**

### ***AGENT DID REPORT***

The Agent DID Report will show the per-agent breakdown of calls coming in to each selected DID.



**Figure 81. IVR(Call Menu) Report**

**INBOUND IVR/CALLMENU REPORT**

The IVR/Call Menu Report will show you the path that calls took through your Dialer Call Menus and optionally into further in-groups. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

The first set of statistics will show you the total number of calls that came into the Call Menus, the total that came in without any CallerID information, and the total of Unique CallerIDs that came in during the selected time period.

The next section is a breakdown(ranked by popularity) of all of the paths that callers took through your Call Menus and into in-groups. The first column shows the total calls that took each path. The second column shows the number of calls that went into an in-group. The third column shows how many of those queue calls dropped, followed by a percentage of that number. The fifth column shows the average amount of time the caller spent in the Call menu listening to prompts and the sixth column shows the average total time of the calls that used this Call Menu path. The last column is the actual path that the callers took through the Call Menus with each step separated by a slash “/”.

## Inbound Forecasting Report (?)

**Dates:**  
 2017-04-26  
 to  
 2017-04-26  
**Target drop rate:**  
 3 % (optional)

**Campaigns:**  
 -- ALL CAMPAIGNS --  
 1000  
 1037  
 140  
 2424

**In-groups:**  
 --ALL INGROUPS--  
 \_STAY - Testing options  
 123 - enjfenj  
 9999999 - 9999999  
 AAA\_ALL\_TEST - Alpha test

[Advanced Forecasting Report](#)  
[DOWNLOAD](#) | [REPORTS](#)

Date range : 2017-04-26 to 2017-04-26  
 Campaigns : --ALL--  
 In-groups : --ALL--

### FORECASTING REPORT

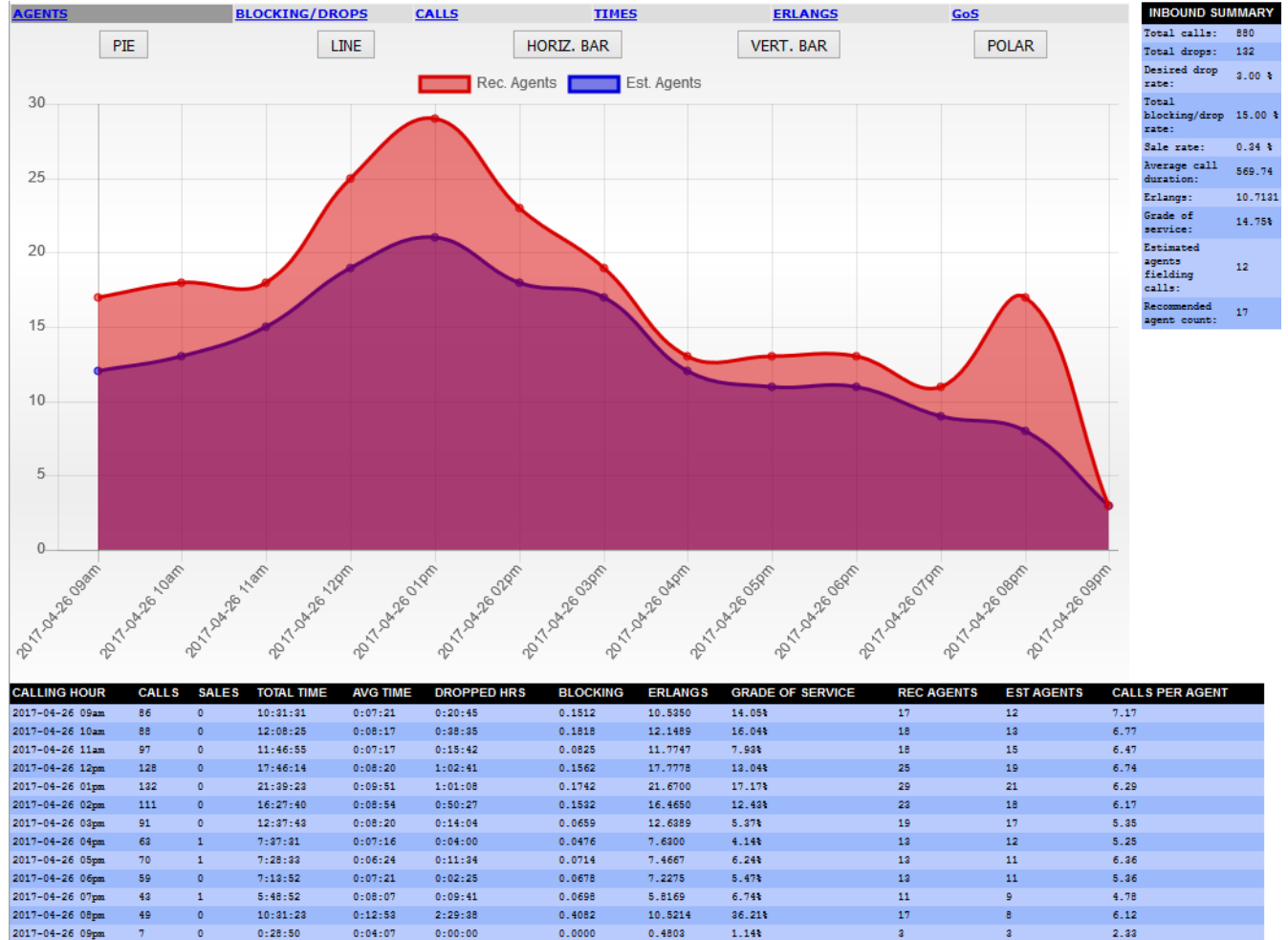


Figure 82. Inbound Forecasting Report

## INBOUND FORECASTING REPORT

This report uses Erlang B formulas to generate call center stats based on inbound call activity for selected campaigns and/or ingroups across a specified date range. From these statistics and also by entering a desired drop call rate, this report can be used to calculate a recommend number of agents to have on the phones to reach the desired drop rate entered.

CALLING HOUR = The hour interval being reported on.

CALLS = Number of calls showing activity in this hour interval. Unlike other reports, this includes calls that start in the preceding hour, if the length of the call causes the call to end in the current hour. Example: an inbound call to the system begins at 9:59am and lasts for three minutes, ending at 10:02am. This call will be counted in both intervals.

**TOTAL TIME** = The total amount of time calls were active within this call interval. This includes time in queue waiting for an agent, and as stated for the **CALLS** section above, calls starting in one hour and ending in the other will have the time spent in each interval counted in both. In the above example, 1 minute will be attributed to the 9am hour and 2 minutes to the 10am hour.

**AVERAGE TIME** = The average call length for the interval, taken by dividing the total time of call activity within this interval divided by the number of calls active within this interval.

**DROPPED HOURS** = The total amount of time taken by calls that were dropped with time active within this call interval.

**BLOCKING** = The drop rate, expressed as a decimal in **TEXT** or a percent in graph form, of an hourly interval. This is taken by dividing the number dropped calls active in the hour by the number of calls active in the hour.

**ERLANGS** = Number of Erlangs for the hour. Erlangs are calculated by taking the number of calls received in an interval, multiplied by the average duration of a call expressed as a decimal value relative to the interval. For example, if 100 calls came in during an hour, and the average call length is 6 minutes, the Erlang value is 100 calls/hour \* .1 hour (6 minutes is 1/10th of an hour), or 10.

**GOS** = 'Grade of Service'. This is the probability that a call is dropped, which is given by the equation  $GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the desired drop rate, -E- is the Erlang value, and -M- is the number of lines/agents needed

**REC AGENTS** = The recommended number of agents needed to meet the desired drop rate or the desired queue probability. For the Erlang B report it uses the formula


$GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the desired drop rate, -E- is the Erlang value, and -M- is the number of lines/agents needed. For the Erlang C report, the equation used is:

$P_{queued} = (EM/M!)/[EM/M! + (1 - E/M)\sum_{n=0}^{M-1} E^n/n!]$  where  $P_{queued}$  is the queue probability, -E- is the Erlang value, and -M- is the number of lines/agents needed

**EST AGENTS** = The estimated number of agents based on the current drop rate and Erlangs, as entered by the user, for the hours being reported on. This is reached by using the Erlang B formula, which is

$GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the current drop rate, -E- is the Erlang value, and -M- is the number of lines/agents

**CALLS/AGENT** = The average number of calls each agent received for the time interval, gotten by dividing the number of calls by the number of agents (estimated, if an -actual agent- value is not given)

Advanced Forecasting Report 				
<b>Dates:</b> 2019-03-21 <input type="text"/> <b>to</b> 2019-03-21 <input type="text"/>  <b>Target drop rate:</b> 3 <input type="text"/> % (B report) <b>Target queue prob.:</b> <input type="text"/> % (C report)	<b>Campaigns:</b> -- ALL CAMPAIGNS -- 05000 1000 1037 140	<b>In-groups:</b> --ALL INGROUPTS-- _STAY - Testing options 123 - enfenfj 25_CL_in - Test 2 255CL_in - Test 1	<b>Cost analysis stats (optional):</b> <b>Actual agents:</b> 0 <b>Hourly pay per agent:</b> \$0 <b>Revenue per sale:</b> \$0 <b>Chance of sale:</b> 0 <input type="text"/> % <b>Retry rate:</b> 0 <input type="text"/> % (B reports only)	<b>Erlang type:</b> <input checked="" type="radio"/> B - inbound/call loss stats <input type="radio"/> C - outbound/waiting time stats  <input type="text" value="TEXT"/> <input type="button" value="SUBMIT"/>  <a href="#">Basic Forecasting Report</a>  <a href="#">DOWNLOAD</a>   <a href="#">MODIFY</a>   <a href="#">REPORTS</a>

PLEASE SELECT AN IN-GROUP AND DATE RANGE ABOVE AND CLICK SUBMIT

**Figure 83. Advanced Forecasting Report**

## ADVANCED FORECASTING REPORT

This report uses Erlang B and C formulas to generate call center stats based on call activity for selected campaigns and/or ingroups across a specified date range. From these statistics and also by entering a desired drop call rate, this report can be used to calculate a recommend number of agents to have on the phones to reach the desired drop rate entered, and depending on whether the report type being run is - B- or -C-, it will display statistics pertaining to call loss (drop) probability, or wait time probability.

**COST ANALYSIS STATS** - This is an entirely optional set of data that can be entered to calculate the monetary performance of campaigns/call centers.

**Actual agents** = If you know the actual number of agents and wish to use this in the report calculations, enter a non-zero value here. If you leave this blank the report will use the number of agents it estimates is in the dialer to make its reports.

**Hourly pay per agent** = Hourly wages an average employee makes.

**Revenue per sale** = How much money each sale made in the selected campaigns/ingroups is worth.

**Chance of sale** = The estimated percentage of calls that result in a sale (the actual percentage is provided after the report is run).

**Retry rate** = The percentage of callers that attempt to retry after their call is dropped.

**CALLING HOUR** = The hour interval being reported on.

**CALLS** = Number of calls showing activity in this hour interval. Unlike other reports, this includes calls that start in the preceding hour, if the length of the call causes the call to end in the current hour.

Example: an inbound call to the system begins at 9:59am and lasts for three minutes, ending at 10:02am. This call will be counted in both intervals.

**TOTAL TIME** = The total amount of time calls were active within this call interval. This includes time in queue waiting for an agent, and as stated for the CALLS section above, calls starting in one hour and ending in the other will have the time spent in each interval counted in both. In the above example, 1 minute will be attributed to the 9am hour and 2 minutes to the 10am hour.

**AVERAGE TIME** = The average call length for the interval, taken by dividing the total time of call activity within this interval divided by the number of calls active within this interval.

**DROPPED HOURS** = The total amount of time taken by calls that were dropped with time active within this call interval.

**BLOCKING** = The drop rate, expressed as a decimal in TEXT or a percent in graph form, of an hourly

interval. This is taken by dividing the number dropped calls active in the hour by the number of calls active in the hour.

ERLANGS = Number of Erlangs for the hour. Erlangs are calculated by taking the number of calls received in an interval, multiplied by the average duration of a call expressed as a decimal value relative to the interval. For example, if 100 calls came in during an hour, and the average call length is 6 minutes, the Erlang value is 100 calls/hour \* .1 hour (6 minutes is 1/10th of an hour), or 10.

GOS = 'Grade of Service'. A -B- report value - this is the probability that a call is dropped, which is given by the equation

$GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the desired drop rate, -E- is the Erlang value, and -M- is the number of lines/agents needed

QUEUE PROB = A -C- report value - the probability that a call is queued, which is given by the equation

$P_{queued} = (EM/M!)/[EM/M! + (1 - E/M)\sum_{n=0}^{M-1} E^n/n!]$  where  $P_{queued}$  is the queue probability, -E- is the Erlang value, and -M- is the number of lines/agents needed

AVERAGE ANSWER = A -C- report value - the average speed of answer, or average call waiting time. This is given by the equation

$ASA = (T * P_{queued}) / (M - E - ASA)$  -ASA- is the average speed of answer, -T- is the average duration of the call,  $P_{queued}$  is the queue probability, -E- is the Erlang value, and -M- is the number of lines/agents needed. Both this and the  $P_{queued}$  formulas above are only valid if -M- is greater than -E-, that is, the number of trunks in a system is greater than the number of Erlangs.

REC AGENTS = The recommended number of agents needed to meet either the desired drop rate or the desired queue probability. These values are entered by the user and depending on whether the report being run is type -B- or type -C- the report will base their estimate on one of those values. For the Erlang B report it uses the formula

$GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the desired drop rate, -E- is the Erlang value, and -M- is the number of lines/agents needed. For the Erlang C report, the equation used is:

$P_{queued} = (EM/M!)/[EM/M! + (1 - E/M)\sum_{n=0}^{M-1} E^n/n!]$  where  $P_{queued}$  is the queue probability, -E- is the Erlang value, and -M- is the number of lines/agents needed

EST AGENTS = The estimated number of agents based on the current drop rate and Erlangs, as entered by the user, for the hours being reported on. This is reached by using the Erlang B formula, for both the B and C report. Since Dialer does not log what calls were queued in outbound dialing, the -C- report instead uses the drop rate of outbound calls to estimate agents. The formula is

$GoS = (EM/M!)/(\sum_{n=0}^M E^n/n!)$  where -GoS- is the current drop rate, -E- is the Erlang value, and -M- is the number of lines/agents

CALLS/AGENT = The average number of calls each agent received for the time interval, gotten by dividing the number of calls by the number of agents (estimated, if an -actual agent- value is not given)

REV/CALL = Average revenue per call, taken by multiplying the revenue per sale by the number of sales, then dividing by the number of calls

REV/AGENT = Average revenue generated per agent, based on the total revenue (sales \* revenue per sale) divided by the number of agents (estimated, if an -actual agent- value is not given)

TOTAL REV = Total revenue, gotten by multiplying the number of sales by the revenue per sale



TOTAL COST = Total cost, gotten by multiplying the agent rate by the number of agents (estimated, if an -actual agent- value is not given)

MARGIN = The difference between the total revenue and the total cost.

Outbound Calling Report

Dates: 2016-11-25 to 2016-11-25  
 Campaigns: TESTCAMP - Test campaign  
 Lists: - ALL LISTS - 101 - Test list import  
 Include Drop: NO  
 Carrier Status: NO  
 Shift: ALL  
 Rollover: NO  
 Buttons Graph: NO  
 Display as: TEXT  
 Search archived data

Outbound Calling Date: 2016-04-27 13:45:07  
 Time range: 2016-04-26 00:00:00 to 2016-04-27 23:59:59

**TOTALS**  
 Total Calls placed from this Campaign: 5900  
 Average Call Length for All Calls in seconds: 2.56  
 Calls that went to rollover In-Group: 0  
**NO ANSWER**  
 Total Number Answered calls for this Campaign: 6194  
 Average Call Length for all BA in seconds: 69.17 Total Time: 02:02:16  
**DROP**  
 Total Number DROP Calls: 1603 2.67%  
 Percent of DROP Calls taken out of Answer: 1603 / 6195 25.88%  
 Percent of DROP/Answer Calls with Roll-over: 1603 / 6195 25.88%  
 Average Length for DROP Calls in seconds: 6.5  
 Productivity Rating: 0.69  
**NO ANSWER**  
 Total BA calls - Busy, Disconnect, Ring#Answer: 4110 70.56%  
 Total auto BA calls - replacement: 5900  
 Total manual BA calls - replacement: 0  
 Average Call Length for BA Calls in seconds: 19.2

**CALL REASON START**  

CALL REASON	CALLS
CUSTOMER	1347
AGENT	1319
URGENT DRIFT	1190
REWORK	903
NO ANSWER	1603
TOTAL	5900

**CALL STATUS START**  

STATUS	DESCRIPTION	CATEGORY	CALLS	TOTAL TIME	Avg TIME	CALLS/HOUR	CALLS/MIN
IA	Answering Machine	UNDEFINED	6091	64:00:27	0:20	54.64	21.54
AP	Busy Answer	UNDEFINED	1029	0:00:00	0:00	13.70	7.83
APX	Fast Machine Busy	UNDEFINED	214	0:01:08	0:29	1.84	0.92
B	Busy	UNDEFINED	219	0:40:27	0:41	1.63	0.92
CALLER	Call Back	UNDEFINED	242	00:00:45	0:16	2.35	1.32
Comp	Comp	UNDEFINED	448	0:40:29	0:27	3.29	1.90
Con	Customer customer	UNDEFINED	2	00:00	0:00	0.00	0.00
DC	Disconnected Number	UNDEFINED	124	01:14	0:11	0.90	0.52
DISPO			7	0:00	0:00	0.00	0.00
DRC	DO NOT CALL	UNDEFINED	696	0:49:11	0:30	4.70	2.73
DRCALL	Lead Being Called	UNDEFINED	44	0:00:00	0:00	0.00	0.00
W	W Answer	UNDEFINED	1609	16:34:46	0:21	12.89	7.44
WA	W Answer Available	UNDEFINED	3769	0:00:00	0:00	249.95	146.27
WI	W Answer Not Available	UNDEFINED	2729	29:54:42	0:40	16.42	10.43
WR	W Answer Not Available	UNDEFINED	1	0:00:00	0:00	1.00	0.50
DRDP	Outbound Fax/Following	UNDEFINED	2	0:00:00	0:00	0.02	0.01
OTHER	Lead to be Called	UNDEFINED	7	0:00:00	0:00	0.01	0.00
SALE	Lead to be Called	UNDEFINED	1	0:00:00	0:00	0.01	0.00
Sale1	Sale Follow	UNDEFINED	33	00:00:40	0:20	0.08	0.11
Sale2	Sale Gen	UNDEFINED	2	00:00	0:00	0.02	0.01
Sale3	Sale Deal	UNDEFINED	43	01:26:19	0:18	0.43	0.24
Tr	Under contract	UNDEFINED	27	01:47	0:11	0.18	0.11
TOTAL			9400	1:46:21:29	0:20	106.54	

**LIST ID START**  

LIST	CALLS
101 -	48716
100 -	4099
400 -	1
300 -	4098
200 -	47
TOTAL	5900

**CARRIER CALL STATUSES**  

STATUS	CALLS
ANSWER	2114
BUSY	2013
CANCEL	3329
CONNECTION	1190
TOTAL	8646

**AGENT PRESET DIALS**  

PRESET NAME	CALLS
D1	1
D3	1
TOTAL	2

**CUSTOM STATUS CATEGORY START**  

CATEGORY	CALLS	DESCRIPTION
TOTAL	0	

**AGENT START**  

AGENT	CALLS	TIME WORK (H:MM:SS)
100 -	828	0:02:12
101 -	724	0:15:10
102 -	276	0:16:40
103 -	427	0:00:14
104 -	850	0:00:13
105 -	1641	0:12:16
109 -	744	0:20:13
110 -	810	0:12:37
111 -	590	0:25:28
112 -	890	0:15:20
113 -	852	0:27:48
114 -	877	0:44:11
115 -	154	0:27:16
119 -	346	0:10:12
121 -	707	0:26:43
122 -	846	0:16:37
123 -	1049	0:10:11
123 -	570	0:40:09
124 -	824	0:26:07
125 -	763	0:10:16
126 -	554	0:27:14
128 -	448	0:03:00
137 -	77	0:21:11
UNASS	1610	0:19:19
TOTAL Agents:	24	1:47:14
Average Talk time between calls:		0:12

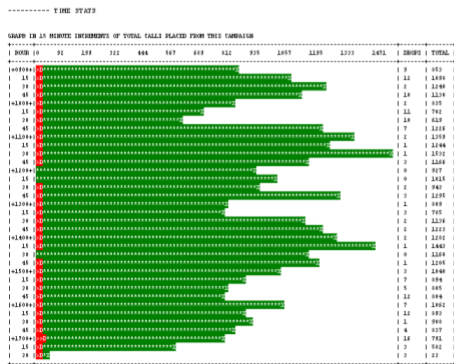


Figure 84. Outbound Calling Report  
 2023-04-10 version

## **OUTBOUND CALLING REPORT**

The VDAD(Dialer Auto-Dialer) Report is a summary of the outbound dialing for the day for a specific campaign or set of campaigns. The first section contains the number of calls placed for this campaign for a specific day along with the average length of a call.

The next section is the number of dropped calls, the average length of a dropped call and the percentage of dropped calls out of the number of answered calls for the campaign for the day. Also included in this section is the total of calls answered when the Drop Rollover group for the campaign is included in the statistics.

The third section is the total number of no-Answer calls(ring-no-answer, busy, disconnect, invalid, ... [the statuses in the NA grouping depends on the kind of outside lines you have]) and the percentage of NAs of the total number of calls placed for the day.

The fourth section shows who hung up the phone when it went on-hook, or in the case of calls that were never answered it will show the reason that the call was terminated such as for outbound, NO ANSWER and for inbound, ABANDON and QUEUE TIMEOUT.

The fifth section shows details about the statuses of the dispositioned calls within the selected campaigns. You can see the description, number of calls and the total time and average time of those calls totaled for each status.

The sixth section shows the lists that were called and how many calls were placed from each list.

The seventh section shows the carrier call termination codes for calls placed. This can sometimes help to diagnose problems with your carrier, if for instance you have a large number of CONGESTIONS.

The eighth section shows the totals for any status categories that you may have set up in the system.

Next is the user section that shows the user IDs and names of all of the agents that took calls in this campaign for this day. This will show the number of calls and total talk time of the calls along with their average talk time for the day per call. At the bottom of this section is also the average time in between calls.

The last section is an ASCII time graph of the number of calls dialed broken down into 15 minute increments. This shows the calls placed in each 15 minute period(in green) along with the number of dropped calls for each 15 minute period(in red) for the entire day during which calls were placed.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

Outbound Summary Interval Report

Form containing Date Range (2016-11-25), Campaigns (ALL CAMPAIGNS), Include Drop (checked), Download (MOORE), Reports (REPORTS), Rollout (NO), Display as (TEXT), Time Interval (15 Minutes), Search (SEARCH), and Submit buttons.

Outbound Summary Interval Report: 2016-11-25 12:00:00

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- R100 - Invoicing P REP

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- R100 - Package

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- R100 - Test Campaign

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - A

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - B

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - C

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - D

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - E

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - F

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - G

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - H

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - I

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - J

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - K

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - L

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

----- STEPA - IT Tests - M

Table with columns: SYSTEM, AGENCY, SALE, DMT, NUMBER, DROP, LIGROW, PERCENT, TIME(M, S). Includes a TOTAL row.

Pub Time: 10 seconds

Figure 85. Outbound Summary Interval Report

## OUTBOUND SUMMARY INTERVAL REPORT

The Dialer Outbound Interval Report gives you a different set of statistics than the general Outbound report, and it also can break down the statistics into 15 minute, 30 minute or 1 hour intervals to view. Also, the results can be filtered by a call time scheme so you can see your totals only for a specific time period during the day.

The first section is a basic totals overview for each selected campaign and a grand total with all selected campaigns. The System Release calls are calls that never make it to an agent, and are dispositioned by the system.

The next sections are a breakdown per campaign by the selected interval of the calling activity during each interval.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

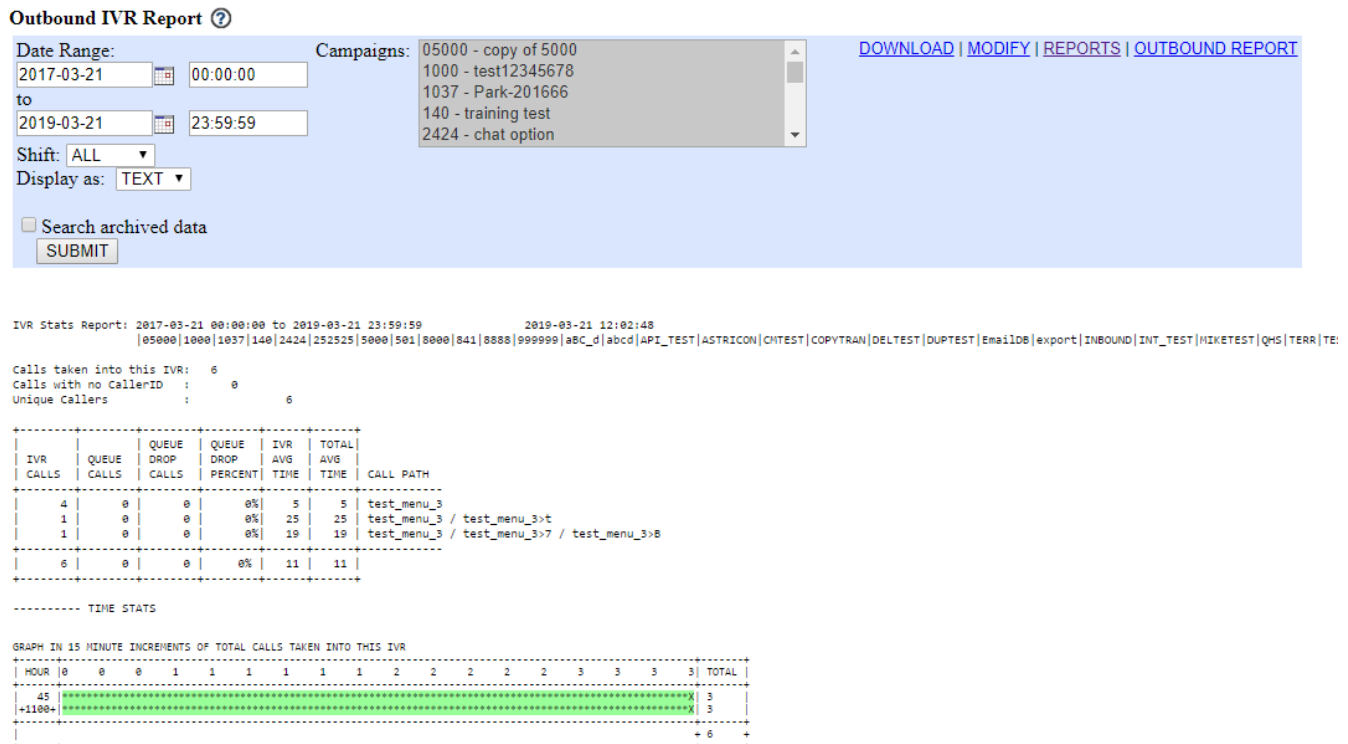


Figure 86. Outbound IVR Report

## OUTBOUND IVR REPORT

This report displays outbound IVR (Call Menu) & Queue statistics. The Outbound IVR work specifically with survey type campaigns. The report provides totals to calls taken, calls without caller ID, and total unique calls. The grid report breaks down your call totals based on the call path, or route

the caller takes through the IVR. The report shows total calls, queue calls, drops, dropped percentage,

average IVR time, and average total time, per call path. There is also an “Export” option for this report that will export call details related to Outbound IVR calls.

## OUTBOUND IVR EXPORT REPORT

This report allows you to export data about outbound IVR call data, including the responses that the people called were selecting.

Callmenu Survey Report

Date Range: 2017-03-21 to 2019-03-21  
 Callmenu / Tracking Group: 277&S? - test277&S?  
 2743 - test inbound recording speak  
 after\_call\_survey\_01 - after\_call\_survey\_01  
 after\_call\_survey\_02 - after\_call\_survey\_02  
 after\_call\_survey\_03\_end - after\_call\_survey\_03\_end

Report type: ALL\_AGENTS  
 User ID:   
 (Single agent only)

Report: ALL\_AGENTS  
 Tracking groups: [277&S?|2743|after\_call\_survey\_01|after\_call\_survey\_02|after\_call\_survey\_03\_end|agent\_cm\_lookup\_test|agent\_login\_test|agent\_title\_test|AGI\_RECORDING|areacode\_routing\_test|callcard\_dialin|callcard\_dialin\_es|CM]

AGENT	survey_inbound_2nd_question_recommend	test_menu_4	TOTAL POINTS:	TOTAL CALLS:
Admin user	6	12	18	7
<b>TOTALS:</b>	<b>6</b>	<b>12</b>	<b>18</b>	<b>7</b>

Run Time: 0 seconds

Figure 87. CallMenu Survey Report

## CALLMENU SURVEY REPORT

This report shows one of two report types. The first displays all responses to callmenu prompts on calls handled by a given agent, within a list of selected campaigns, for a given time frame. Each call is displayed in chronological order, and for each call, the prompts and responses given are displayed. Each prompt response is treated as its numerical value to create a point total for the call, and total points per prompt and call are given at the bottom of the report. The second report is a multiple agent report, which utilizes the dates given and campaigns selected (the value in the agent field is ignored). The resulting report gives a summary per agent of the prompts met and total value of the responses given. The results for this report are sorted in descending order based on the total points the agent accrued.

### SINGLE AGENT REPORT

PHONE = The customer's phone number on the call.

START TIME = The call time from the live\_inbound\_log table.

TOTAL POINTS = The sum of the numeric values given for all callmenu survey prompts reached on the call.

### ALL AGENT REPORT

AGENT = The name of the agent.

TOTAL POINTS = The sum of the numeric values given for all callmenu survey prompts for calls the agent handled within the report parameters.

### Outbound Lead Source Report ?

Entry date: 2019-01-21 00:00:00 Campaign: TESTCAMP Display as: TEXT [DOWNLOAD](#) | [REPORTS](#)

to 2019-03-21 23:59:59 Group by:  Search archived data  
source\_id

SUBMIT

CAMPAIGN: TESTCAMP

SOURCE ID : VDCL

DISPOSITION	CALLS	PERCENT
Turducken approved	2	100.00%
TOTAL	2	

SOURCE ID : TOTALS

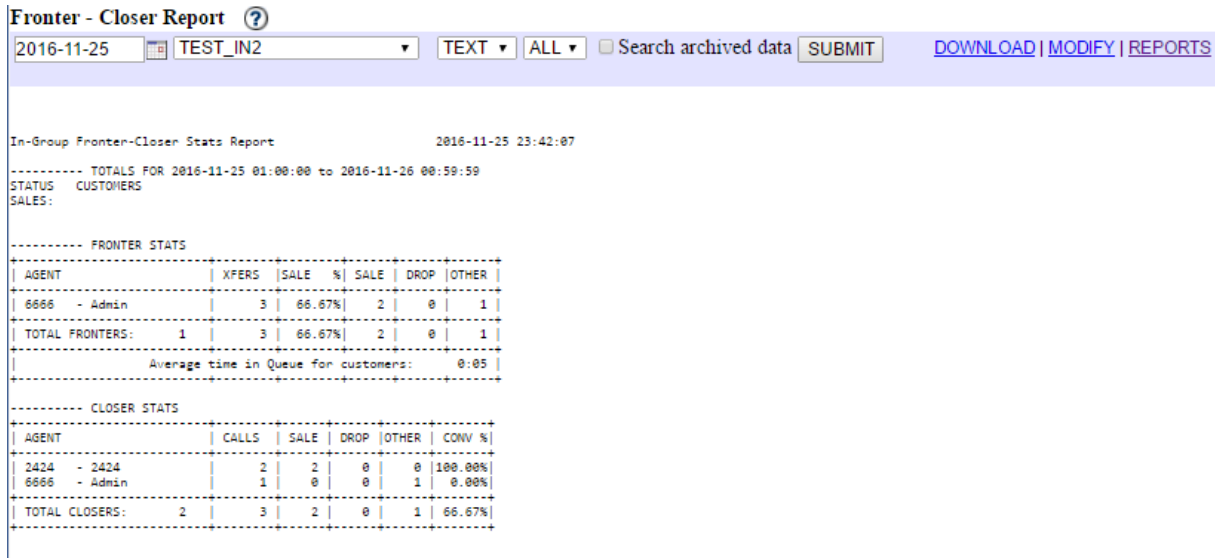
DISPOSITION	CALLS	PERCENT
Turducken approved	2	100.00%
GRAND TOTAL	2	

Figure 88. Outbound Lead Source Report

### **OUTBOUND LEAD SOURCE REPORT**

This report is designed to show the breakdown by either vendor\_lead\_code or source\_id, choice of the user, of the calls and their statuses for all lists within a campaign for a set time period.





**Figure 89. Frontier - Closer Report**

### ***FRONTIER – CLOSER REPORT***

This report can be useful if you have Dialer agents sending calls to other Dialer agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report at the top will show the frontier statistics including the number of calls transferred, and out of those the number that became sales (Success%) as well as the other statuses that the calls ended up being dispositioned as. The bottom half of the report gives statistics on the Closer, or the agent that the call was sent to after the frontier. This section shows some additional information including the conversion percentage. Any disposition flagged as “Sales” is included in the sales statistics of this report.

**Frontier - Closer Detail Report**

Date: 2019-01-21 to: 2019-03-21  
 Ingroup: SUPERT  
 TEST\_EMAIL\_EMPTY  
 TEST\_ERROR  
 TEST\_IN  
 TEST\_IN2  
 Campaigns: -- ALL CAMPAIGNS --  
 05000  
 1000  
 1037  
 140  
 User Groups: -- ALL USER GROUPS --  
 5000  
 7457  
 7ADMIN  
 ADMIN  
 Users: -- ALL USERS --  
 1000 - test agent with a loooong name  
 10000 - test user  
 10001 - test user  
 1002 - test agent  
 Search archived data  
 Show frontier/closer summary  
 SUBMIT  
 DOWNLOAD | MODIFY | REPORTS  
 Shift: ALL

CALL DATE (INITIAL)	LEAD ID	PHONE NUMBER	PROVINCE	USER	USER GROUP - FRONTIER	FRONT CAMP	INBOUND/XFER GROUP	RECVD CAMP	RCVD GROUP	USER	USER GROUP -
2019-02-16 08:12:17	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-16 08:12:17	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-20 23:18:59	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-20 23:18:59	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-20 23:29:24	1922631	9998883112		6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-20 23:29:24	1922631	9998883112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-20 23:31:11	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-20 23:36:39	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-20 23:37:20	1891269	9998887112	U	6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-21 12:36:21	1922631	9998883112		6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-21 12:36:21	1922631	9998883112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-21 12:41:52	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-21 12:42:20	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	6666	ADMIN
2019-02-22 10:51:14	1139564	3125551212	Inbound 2	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-22 10:52:27	1139564	3125551212	Inbound 2	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	2424	ADMIN
2019-02-22 10:53:06	1139564	3125551212	Inbound 2	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-22 11:44:30	1139564	3125551212	Inbound 2	6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-22 11:44:30	1139564	3125551212	Inbound 2	6666	ADMIN	TESTCAMP	TEST_IN3	TESTCAMP	TEST_IN3	2424	ADMIN
2019-02-23 10:00:24	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-02-23 10:00:24	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN
2019-03-21 11:50:44	1922348	9998887112		6666	ADMIN	TESTCAMP	TEST_IN2	TESTCAMP	TEST_IN2	6666	ADMIN

**Figure 90. Frontier – Closer Detail Report**

**FRONTIER – CLOSER DETAIL REPORT**

This report displays frontier and closer information on an in-group for the selected date - useful in local closer campaigns so you can see the activity on internal transfers.

This report can be useful if you have Dialer agents sending calls to other Dialer agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report will show you a detailed accounting of every call that is sent from a frontier agent to a closer agent, what the lead ID of the call was and the time of the original call and the transfer time. You can also select to see a summary of this output included in the report.

**FRONTIER STATS**

AGENT = The agent making the transfer (frontier).

XFERS = The number of transfers the agent made.

SALE % = Percentage of transfers the agent made that resulted in a sale.

SALE = Number of sales (statuses where sale status flag is set to Y in the -Statuses- section) made on the agents transfers.

DROP = Number of transfers that were dropped (did not make it to a live closer).

OTHER = Number of transfers that were not dropped, but also not sold by the closer.

**CLOSER STATS**

AGENT = The agent receiving the transfer (closer).

CALLS = Total calls answered by the closer.

SALE = Number of sales (statuses where sale status flag is set to Y in the -Statuses- section) made on the transfers the closer fielded.

DROP = Number of calls the closer received that were disposed as dropped.

OTHER = Calls the closer fielded that did not result in sales.

CONV % = Percentage of transfers the closer received that resulted in sales.

Lists Pass Report

Campaigns: TEST22 - Training September 2009  
 Display as: [TEXT](#) | [MODIFY](#) | [REPORTS](#)  
 Search archived data

Lists Pass Report 2023-11-25 13:50:23

LIST ID	LIST ID and NAME	GWPASST	LEAD COUNT	ACTIVE	CONTACTS					CITY RATE					SALES					CONV RATE						
					1st PASS	2nd PASS	3rd PASS	4th PASS	5th PASS	1st PASS	2nd PASS	3rd PASS	4th PASS	5th PASS	1st PASS	2nd PASS	3rd PASS	4th PASS	5th PASS	1st PASS	2nd PASS	3rd PASS	4th PASS	5th PASS		
107	performance list	TESTCMP	89880	ACTIVE	4363	23	4	1	0	478	7.2%	0.00%	0.00%	0.00%	0.00%	7.9%	66	10	0	0	0	75	0.13%	0.00%	0.00%	
232	time zone code test	TESTCMP	63	ACTIVE	3	0	0	1	1	10	4.76%	0.00%	0.00%	1.89%	1.89%	16.87%	3	0	0	1	1	6	4.76%	0.00%	0.00%	
888	test telephone list	TESTCMP	409	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0.00%	0.00%	0.00%		
929	OC testlist	TESTCMP	0	INACTIVE	0	0	0	0	0	1	0.00%	0.00%	0.00%	0.00%	0.00%	16.00%	0	0	0	0	0	1	0.00%	0.00%	0.00%	
992	Test Outbound DWR	TESTCMP	9	INACTIVE	0	0	0	0	0	2	0.00%	0.00%	0.00%	0.00%	0.00%	22.22%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
998	Logout	TESTCMP	168	INACTIVE	1	4	1	1	1	33	0.6%	1.19%	0.0%	1.3%	0.6%	28.00%	0	0	0	0	0	1	0.00%	0.0%	0.00%	
9988	vtiger Import	TESTCMP	31	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
10000	CDI TEST	TESTCMP	28	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
10000	Standard Format	TESTCMP	28	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
10000	Tab delimited	TESTCMP	14	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
10000	hid file	TESTCMP	14	INACTIVE	0	1	0	1	1	1	0.00%	7.14%	0.00%	7.14%	7.14%	7.14%	0	0	0	0	0	1	0.00%	0.00%	0.00%	
10004	ODS test	TESTCMP	14	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
10000	updated test API list	TESTCMP	29	INACTIVE	0	0	0	0	0	2	0.00%	0.00%	0.00%	0.00%	0.00%	10.34%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
99889	CF test per load end list	TESTCMP	60000	INACTIVE	0	0	0	0	1	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
20394	Test manual dial lis	TESTCMP	23	INACTIVE	11	9	9	5	0	12	46.00%	32.00%	36.00%	20.00%	24.00%	48.00%	0	0	0	0	0	2	0.00%	0.00%	0.00%	
99888	Employee Entry test	TESTCMP	6308	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	1	0.00%	0.00%	0.00%	
933303	test list 01	TESTCMP	29	INACTIVE	1	1	1	1	1	1	3.45%	3.45%	3.45%	3.45%	3.45%	3.45%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
933302	test list 02	TESTCMP	84	INACTIVE	0	0	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
12345678	central leads	TESTCMP	50	INACTIVE	0	0	0	0	0	3	0.00%	0.00%	0.00%	0.00%	0.00%	6.00%	0	0	0	0	0	3	0.00%	0.00%	0.00%	
18000020	OC testlist split 0	TESTCMP	60000	INACTIVE	1	0	0	0	1	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0.00%	0.00%	0.00%	
18000021	OC testlist split 1	TESTCMP	60000	INACTIVE	0	0	0	0	0	1	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0	0	0	0	0	0	0	0.00%	0.00%	0.00%
TOTAL:					47931	4363	37	25	11	10	4886	1.3%	0.00%	0.00%	0.00%	0.00%	1.9%	69	11	0	1	1	99	0.00%	0.00%	0.00%

Run Time: 22 seconds

Figure 91. Lists Pass Report

LISTS PASS REPORT

This report does an in-depth analysis of several of the status flags from the first pass of the list through to the fifth pass, as well as the totals with all passes included. The total numbers as well as the rate for each pass are included. The status flags used are: CONTACTS, SALES, DNC, CUSTOMER CONTACT, UNWORKABLE, SCHEDULED CALLBACKS and COMPLETED.

NOTE: This report can take a very long time to run on larger systems, and it may possibly lock your system, affecting production during call handling hours. It is recommended that you only run this report on a slave database server or after-hours.

Lists Campaign Statuses Report ?

Campaigns: Display as: [MODIFY](#) | [REPORTS](#)

TEST22 - Training September 2009  
 TEST8 - Training Test Campaign  
 TEST9 - TEST CAMPAIGN CEPSTRAL  
 TESTBLND - Test Blended Campaign  
 TESTCAMP - Test Campaign

Search archived data

[SWITCH TO LISTS](#)

Lists Campaign Status Stats 2016-11-26 00:09:32

----- LIST ID SUMMARY [DOWNLOAD](#)

LIST	LEADS	ACTIVE
107 - performance list	59980	ACTIVE
222 - time zone code test	69	ACTIVE
888 - test timecode list	469	INACTIVE
828 - DC testlist	6	INACTIVE
992 - Test Outbound IVR	9	INACTIVE
998 - inbound	158	INACTIVE
9988 - Vtiger Import	31	INACTIVE
10000 - CSV TEST	28	INACTIVE
10001 - Standard Format	25	INACTIVE
10002 - Tab delimited	14	INACTIVE
10003 - XLS file	14	INACTIVE
10004 - ODS test	14	INACTIVE
11091 - Updated test APT listvix	29	INACTIVE
99888 - CF test per load end list	60000	INACTIVE
22344 - Test manual dial lis	25	INACTIVE
999888 - Employee Entry test	6108	INACTIVE
3333801 - test list 01	29	INACTIVE
3333802 - test list 02	24	INACTIVE
12345678 - central leads	50	INACTIVE
100000010 - DC testlist split 0	60000	INACTIVE
100000011 - DC testlist split 1	60000	INACTIVE
TOTAL:	247131	

----- STATUS FLAG SUMMARY: (and % of leads in selected lists) [DOWNLOAD](#)

Human Answer	Count	Percentage
Human Answer	4551	1.96%
Sale	67	0.03%
DNC	14	0.01%
Customer Contact	150	0.06%
Not Interested	84	0.03%
Unavailable	124	0.05%
Sched Callbacks	7	0.00%
Completed	228	0.09%

----- CUSTOM STATUS CATEGORY STATS [DOWNLOAD](#)

CATEGORY	CALLS	DESCRIPTION
TEST	48	This is a test 2
YASC	140	Yet another status category
TRANSFERS	0	Transfer tracking
TOTAL	188	

----- PER LIST DETAIL STATS [DOWNLOAD](#)

LIST	STATUS	LEADS	PERCENTAGE
107 - performance list	ACTIVE	59980	
TOTAL LEADS:		59980	
STATUS FLAG BREAKDOWN: (and % of total leads in the list)			
Human Answer:	4776	7.96%	
Sale:	61	0.10%	
DNC:	6	0.01%	
Customer Contact:	116	0.19%	
Not Interested:	69	0.11%	
Unavailable:	117	0.19%	
Sched Callbacks:	0	0.00%	
Completed:	228	0.38%	

----- STATUS BREAKDOWN: [DOWNLOAD](#)

STATUS	DESCRIPTION	COUNT
ADC	Disconnected Number Auto	48
AGITA	Agent Answering Machine	2
B	Busy	79
CBIZ		2
DC	Disconnected Number	2
DCIVX		19
DCIVXX		9
DEC	Declined Sale	2
DISIVX		1
DISIVXX		2
DNC	DO NOT CALL	1
DNCC		2
DNCL		3
DRDP	Agent Not Available DRDP	14569
ERC		12
HELLO		4
LRERR	Local Resolution Error	2301
II	No Answer	412
IA	No Answer AutoDial	324
IBL	New Lead	18680
IIZ	Not Interested	87
IP	No Pitch No Price	120
PRDP	Outbound Pre-Routing Drop	18976
PU	Picked up	148
QCIBL		2
QCPASS	QC PASS	3
SALE	Sale Made	3
SOSALE		2
SPH		1
SSALE	Super Sale	5
TD	Turducken approved	48
TEST	Test status dnc	5
TZINOT	Inbound Queue Timeout Drop	1
WI	Wrong Number	164
XFER	Call Transferred	4367
XGS		4
XGH	Extra GH status	6
TOTAL:		59980

Figure 92. Lists Campaign Statuses Report

## LISTS CAMPAIGN STATUSES REPORT

This report provides Various List specific information. LIST ID SUMMARY shows the total leads per list. STATUS FLAG SUMMARY shows a breakdown, by Status Flag, for the specified leads. PER LIST DETAIL STATS displays the Status Flag Summary and the status totals for each individual list. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

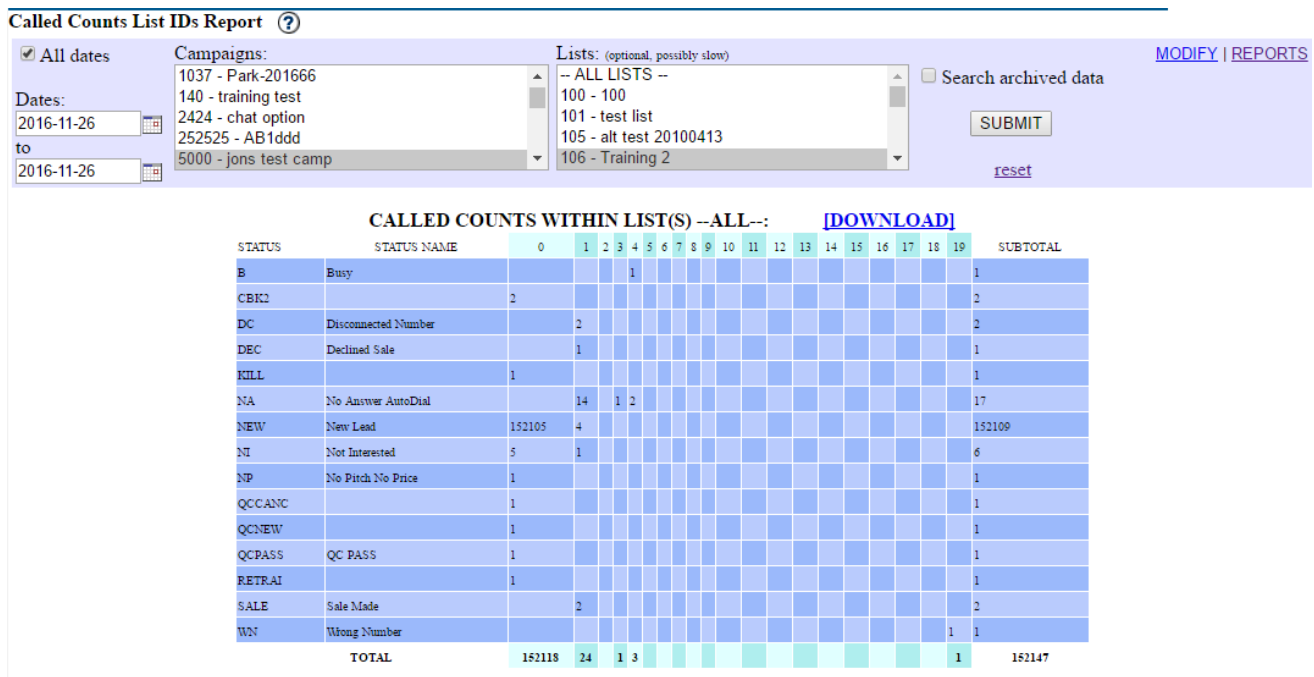


Figure 93. Called Count List IDs Report

## ALLED COUNTS LIST IDS REPORT

This report will show a called count breakdown by status for a list or group of lists, optionally within a given date range. Lists may also be selected by campaign.

## Campaign Status List Report ?

<b>Dates:</b> 2016-11-21 <input type="text"/> 00:00:00 to 2016-11-26 <input type="text"/> 23:59:59	<b>Campaigns:</b> TEST22 TEST8 TEST9 TESTBLND TESTCAMP	<b>Display as:</b> TEXT <input type="text"/> <input type="checkbox"/> Search archived data <input type="button" value="SUBMIT"/>	<a href="#">DOWNLOAD</a>   <a href="#">REPORTS</a>
---	---	---	--

**CAMPAIGN: TESTCAMP**  
 List ID #107: performance list  
 \*\*\*NO CALLS FOUND FROM 2016-11-21 00:00:00 TO 2016-11-26 23:59:59\*\*\*  
 List ID #222: time zone code test  
 \*\*\*NO CALLS FOUND FROM 2016-11-21 00:00:00 TO 2016-11-26 23:59:59\*\*\*  
 List ID #888: test timezone list  
 \*\*\*NO CALLS FOUND FROM 2016-11-21 00:00:00 TO 2016-11-26 23:59:59\*\*\*

List ID #929: DC testlist

DISPOSITION	CALLS	DURATION	HANDLE TIME
NP - No Pitch No Price	2	0:00:30	0:00:19
SALE - Sale Made	4	0:01:42	0:01:03
XFER - Call Transferred	6	0:01:02	0:01:22
<b>TOTALS:</b>	<b>12</b>	<b>0:03:14</b>	<b>0:02:44</b>

929 - DC testlist	INACTIVE
TOTAL CALLS:	12
<b>STATUS FLAGS BREAKDOWN: (and % of total leads in the list)</b>	
Human Answer:	12 100.00%
Sale:	4 33.33%
DNC:	0 0.00%
Customer Contact:	0 0.00%
Not Interested:	0 0.00%
Unworkable:	0 0.00%
Scheduled callbk:	0 0.00%
Completed:	0 0.00%

**Figure 94. Campaign Status List Report**

### ***CAMPAIGN STATUS LIST REPORT***

For the indicated campaign, this displays lead statuses broken down by list. This will also show total calls, duration, and handle time. This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.



Dialer Inventory Report ?

Report type:  Campaigns  List

Campaigns: -- ALL CAMPAIGNS --  
 1000  
 2424  
 252525  
 5000

Time setting:  Server  Local  Ignore local campaign call time (default to 24 hours)

Report source:  Snapshot

Snapshot time: 2012-02-22 13:47:41

[DOWNLOAD](#) | [REPORTS](#)

SNAPSHOT from 2012-02-22 13:47:41  
 Date: 11/26/2016 -- Time: 08:14 am

Call list	List description	Campaign	Last call date	Start Inv	Call Inv Total	Call Inv No filter	Call Inv One-off	Call Inv Inactive	Dial Avg	Pen. %	9TO5MOND	POID	TEST	INITTEST
100	100	5000	*** Not called ***	6170	6170	6170	6170	0	0.0	0.00%	6170	6170	6170	
177	goodbye list	5000	2009-04-07 14:05:42	6907	7	7	7	0	6.6	99.88%	7	7	7	
221	time zone code test	5000	2012-02-22 13:46:58	21	14	14	12	5	21.0	33.33%	14	14	13	
4545	training class test list	5000	*** Not called ***	50	47	47	46	9	0.3	6.00%	47	47	47	
4567	leads 7270234867	5000	2012-01-04 11:45:11	50	50	50	50	50	1.0	0.00%	50	50	50	
5000	ions test list	5000	*** Not called ***	0	0	0	0	0	0.0	0.00%	0	0	0	
5055	fax	5000	2011-07-07 15:59:40	5	5	5	5	0	0.1	0.00%	5	5	5	
8888	empty test	5000	*** Not called ***	10000	10000	10000	10000	0	0.0	0.00%	10000	10000	10000	
2121	2121	8888	*** Not called ***	0	0	0	0	0	0.0	0.00%	0	0	0	
334	Astricon demo list 2	ASTRICON	2012-01-12 14:31:36	108	98	98	0	27	1.1	9.26%	98	98	98	
189	test1 list	TEST1	2009-10-21 10:47:59	45	42	42	0	42	0.5	6.67%	42	42	42	
190	test leads	TEST2	*** Not called ***	52	50	50	0	50	0.0	3.85%	50	50	50	
188	performance leads	TEST2	2009-09-21 13:24:09	15	14	14	0	2	2.3	6.87%	14	14	14	
106	Training	TEST8	*** Not called ***	415	415	415	0	2	0.0	0.95%	415	415	414	
101	test list	TEST9	2009-05-04 19:48:13	64	64	64	0	0	0.0	0.00%	64	64	64	
333	astricon demo list	TEST9	2009-10-15 17:42:29	13	13	13	0	1	0.8	0.00%	13	13	13	
1011	Live test list	TEST9	2009-05-04 19:56:45	5	5	5	0	0	7.0	0.00%	5	5	5	
107	test description	TESTCAMP	2010-07-13 10:55:59	43	38	49	38	0	0.0	11.63%	38	38	38	
108	utfs test list	TESTCAMP	2009-10-16 07:27:40	96	86	86	85	10	1.5	31.25%	86	86	86	
888	test timezone list	TESTCAMP	*** Not called ***	16	16	16	16	0	0.1	0.00%	16	16	16	
928	DC testlist	TESTCAMP	2010-11-08 04:29:32	2186	2135	2186	2135	0	0.0	2.33%	2135	2135	2135	
992	for use with outbound IVR test	TESTCAMP	2011-09-23 11:24:05	5	0	0	0	0	9.2	100.00%	0	0	0	
998	inbound	TESTCAMP	*** Not called ***	57	52	52	52	5	0.9	8.77%	52	52	52	
999	Default inbound list	TESTCAMP	2011-09-28 20:05:09	1640	1518	1519	1518	164	1.3	7.44%	1518	1518	1518	
1201	Updated test API list	TESTCAMP	*** Not called ***	0	0	0	0	0	0.0	0.00%	0	0	0	
1234	test multi-elt list	TESTCAMP	2010-09-27 21:37:31	14	0	0	0	0	9.4	100.00%	0	0	0	
8107	alt performance test	TESTCAMP	2012-02-13 16:32:03	114055	110819	110819	98244	2649	1.4	2.82%	110795	110819	68463	
9988	Vtiger Import	TESTCAMP	2009-02-02 03:25:53	19431	19427	19427	19427	11	0.0	0.02%	19427	19427	19427	
10000	CSV TEST	TESTCAMP	*** Not called ***	20	20	20	20	0	0.0	0.00%	20	20	20	
10001	Standard Format	TESTCAMP	*** Not called ***	28	28	28	28	0	0.0	0.00%	28	28	28	
10002	Tab delimited	TESTCAMP	*** Not called ***	14	14	14	14	0	0.1	0.00%	14	14	14	
10003	XLS file	TESTCAMP	*** Not called ***	14	14	14	14	0	0.0	0.00%	14	14	14	
10004	ODS test	TESTCAMP	*** Not called ***	14	14	14	14	0	0.0	0.00%	14	14	14	
11001	Updated test API listXX	TESTCAMP	*** Not called ***	0	0	0	0	0	0.0	0.00%	0	0	0	
151515	List file with space in the na	TESTOUT	*** Not called ***	98	98	98	0	4	0.1	0.00%	98	98	98	
TOTALS				168742	151295	151313	137878	3831	2.0	5.90%	151332	151295	108998	0

Executed in 0 seconds

Figure 95. Dialer Inventory Report

**DIALER INVENTORY REPORT**

This report displays cached statistics on leads in lists and a perl script enabled in the crontab to work. This can be pulled for just a list, a campaign (displaying all the lists attached), or several campaigns.

The report displays the list ID, list description, campaign ID, last called date. It also shows:

- Start Inv – total leads to start
- Call Inv Total – total of all leads that have been dialed
- Call Inv No Filter - if the filter on the campaign is disabled, this is how many leads are dialable
- Call Inv One-off – number of leads that are 1 call shy of reaching the campaign call count limit
- Call Inv Inactive - inactive status leads
- Dial Avg – average number of call attempts for the leads in that list
- Pen - Penetration
- 9TO5MOND – This column (as well as the ones that follow) shows how many leads have hit the called count target within the indicated shit time.

This report displays category totals, for all lists shown, at the bottom. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

NOTE: This report is only available if an Administrator has set it up to run on your system. The back-end process that generates the cached data used by this report can take hours to run.



**Inbound Report** [?](#)

Date Range: 2016-10-26 to 2016-11-26  
 Shift/Call time: ALL  
 Display as: TEXT  
 Search archived data

Email Accts: ---NONE---  
 dbNewEmail - DanEmail  
 DEV\_EMAIL - Dev test email  
 EMAIL\_XFER\_TEST - Testing email transfers  
 EMAILCOPY - Test ingroup for priority

[MODIFY](#) | [IVR\\_REPORT](#) | [v1](#) | [REPORTS](#)

Inbound Email Stats: [DEV\_EMAIL][JOI\_TEST\_IN\_EMAIL] 2016-11-26 00:18:05 [Download](#)

----- MULTI-GROUP BREAKDOWN: -----

EMAIL	EMAILS	DROPS	DROP %	ZIV
DEV_EMAIL	6	0	0%	0
JOI_TEST_IN_EMAIL	1	0	0%	0

Time range: 2016-10-26 00:00:00 to 2016-11-26 23:59:59

----- TOTALS -----  
 Total Emails taken in to this In-Group : 7  
 Average Email Length for all Emails : 432 seconds  
 Answered Emails : 7 100%  
 Average queue time for Answered Emails : 99999.99 seconds  
 Emails taken into the ZIV for this In-Group : 0

----- DROPS -----  
 Total DROP Emails: 0 0% drop/answered: 0%  
 Average hold time for DROP Emails: 0 seconds

----- CUSTOM INDICATORS -----  
 Q08 (Answered/Total emails taken in to this In-Group) : 100%  
 WCR (Dropped/answered) : 0%  
 TH1L (Answered within 30 seconds/answered) : 0%  
 TH1R (Answered within 30 seconds/answered) : 0%

----- QUEUE STATS -----  
 Total Emails That Entered Queue: 7 100%  
 Average QUEUE Length for queue emails: 99999.99 seconds  
 Average QUEUE Length across all emails: 99999.99 seconds

----- EMAIL HOLD TIME BREAKDOWN IN SECONDS ----- [Download](#)

	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7

----- EMAIL DROP TIME BREAKDOWN IN SECONDS -----

	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

----- EMAIL HIGHERED TIME AND PERCENT BREAKDOWN IN SECONDS -----

INTERVAL	ZIV	%	0%	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%	90%	+90%	TOTAL
ZIV	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7
CUMULATIVE	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7
CUM AVG %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7

----- EMAIL HANGUP REASON STATS ----- [Download](#)

HANGUP REASON	EMAILS
ABSENT	6
IGNORE	1
TOTAL:	7

----- EMAIL STATUS STATS ----- [Download](#)

STATUS	DESCRIPTION	CATEGORY	EMAILS	TOTAL TIME	AVG TIME	EMAILS/HOUR
ZICALL	Lead Being Called	UNDEFINED	1	0:00:00	0:00:00	1.19
TD	Transfer approved	UNDEFINED	6	0:50:26	0:00:24	7.14
TOTAL:			7	0:50:26	0:07:12	8.33

----- CUSTOM STATUS CATEGORY STATS ----- [Download](#)

CATEGORY	EMAILS	DESCRIPTION
TEST	0	This is a test 2
VASC	0	Yet another status category
TRANSFER	0	Transfer tracking
TOTAL	0	

----- EMAIL INITIAL QUEUE POSITION BREAKDOWN ----- [Download](#)

	1	2	3	4	5	6	7	8	9	10	15	20	25	+25	TOTAL
	7														7

----- AGENT STATS ----- [Download](#)

AGENT	EMAILS	TIME HITS	AVERAGE
6666 - Admin	6	0:50:26	0:08:24
TOTAL Agents:	1	6	0:50:26   0:08:24

----- TIME STATS ----- [Download](#)

GRAPH IN 15 MINUTE INCREMENTS OF TOTAL EMAILS TAKEN INTO THIS IN-GROUP

HOUR	0	0	1	1	2	2	3	3	4	4	4	5	5	6	6	DROPS	TOTAL
+0000:	15																
+0300:	30																
+0600:	45																
+0900:	15																
+1200:	30																
+1500:	45																
+1800:	15																
+2100:	30																
+2400:	45																
+2700:	15																
+3000:	30																
+3300:	45																
+3600:	15																
+3900:	30																
+4200:	45																
+4500:	15																
+4800:	30																
+5100:	45																
+5400:	15																
+5700:	30																
+6000:	45																
+6300:	15																
+6600:	30																
+6900:	45																
+7200:	15																
+7500:	30																
+7800:	45																
+8100:	15																
+8400:	30																
+8700:	45																
+9000:	15																
+9300:	30																
+9600:	45																
+9900:	15																
TOTALS:																	7

Run Time: 0 seconds|5

**Figure 96. Inbound Email Report**

**INBOUND EMAIL REPORT**

This report displays data from a date period, for one or more email groups. If more than one email group has been selected, there will be a multi-group breakdown grid at the top. The totals section displays the total number of emails handled, average handle time, and average time emails spent in the queue.

Drops can be ignored, as it's not functional at this time. While customer indicators with display the number of emails handled inside of the defined queue intervals.

Queue stats, email hold time breakdown in seconds, email drop time breakdown, and email hangup reason can also be ignored.

The email status stats show the status, its description, category, number of emails, total time, average

time, and email per hour. The custom status category merely shows the custom status, description, and total calls.

Initial queue position displays a chart showing tallies of the initial queue position of all emails in the selected in-groups when they came into the queue.

Below the agent stats, is a chart show the entire time agents were logged in, and the total emails handled (separated in 15 minute intervals) during that time.

The last report is the email answered breakdown, displaying how quickly emails were answered, by 15 minute intervals, throughout a 24 hour day. The response time is divided in set increments of seconds, and shows the total emails answered inside of those criteria.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

**Email Log Report** ?

Date Range: 2016-10-26 to 2016-11-26

Email groups:
 

- NONE---
- dbNewEmail - DanEmail
- DEV\_EMAIL - Dev test email**
- EMAIL\_XFER\_TEST - Testing email transfers
- EMAILCOPY - Test ingroup for priority

[MODIFY](#) | [IVR REPORT](#) | [REPORTS](#) |

Search archived data

Select date criteria:
 

- Date email received
- Date email viewed
- Date email answered

Select report type to display:
 

- Emails received
- Emails viewed
- Emails answered

Showing emails received that were received from 2016-10-26 00:00:00 to 2016-11-26 23:59:59

Email log results: |DEV\_EMAIL| 2016-11-26 00:22:18 [DOWNLOAD](#)

DATE EMAIL RECEIVED	ADDRESS FROM	SENDER NAME	MESSAGE	STATUS
2016-10-26 17:44:35	noreply@youtube.com	YouTube	<a href="#">Here are the newest videos from each of your su...</a>	NEW
2016-11-02 01:13:22	noreply@youtube.com	YouTube	<a href="#">Here are the newest videos from each of your su...</a>	NEW
2016-11-08 23:24:19	noreply@youtube.com	YouTube	<a href="#">Here are the newest videos from each of your su...</a>	NEW
2016-11-09 14:45:42	noreply-google-plus@google....	"Google+"	<a href="#">So much more to explore Dive right in and follo...</a>	TD
2016-11-15 23:35:07	noreply@youtube.com	YouTube	<a href="#">Here are the newest videos from each of your su...</a>	NEW
2016-11-24 00:02:00	noreply@youtube.com	YouTube	<a href="#">Here are the newest videos from each of your su...</a>	NEW

Run Time: 0 seconds|M

**Figure 97. Email Log Report**

## **EMAIL LOG REPORT**

This report displays data from a date period, for one or more email groups. If more than one email has been selected, there will be a multi-group breakdown grid at the top. While a date range can be selected at the top, the select date criteria determines whether that date represents when the email was either received, reviewed, or answered.

### **Report types:**

Emails received - Displays the date & time received, the from address, sender name, subject line (which links to the email), and status.

Emails viewed - Shows the date & time received, the from address, sender name, subject line (which links to the email), date & time viewed, and status.

Emails answered - Indicates the date & time received, the from address, sender name, subject line (which links to the email), date & time viewed, date & time answered, user ID of the agent that responded, subject line of the response (which links to the response), and status.

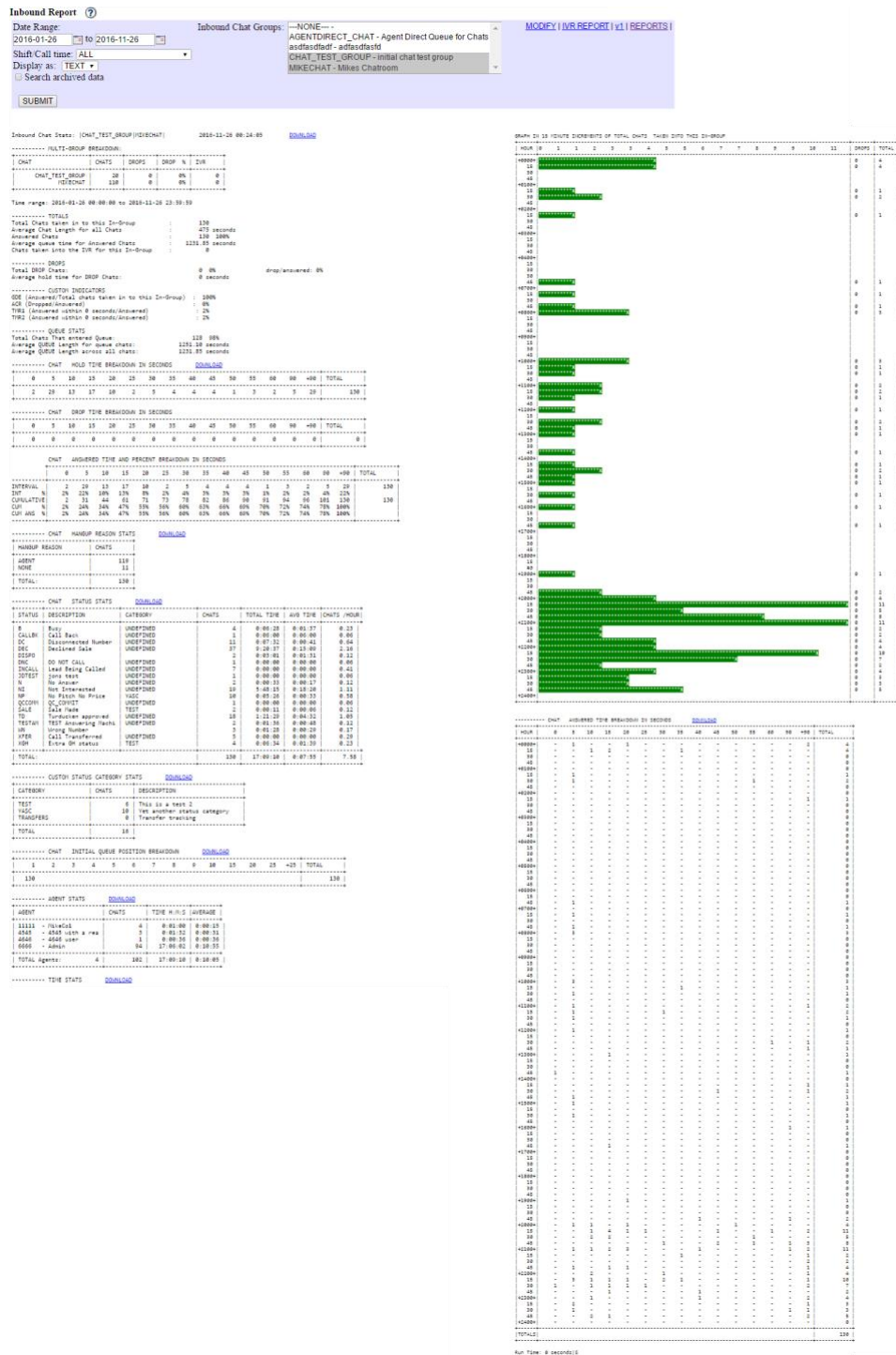


Figure 98. Inbound Chat Report

### INBOUND CHAT REPORT

This report displays data from a date period, for one or more chat groups. If more than one chat group has been selected, there will be a multi-group breakdown grid at the top. The totals section displays the total number of chats handled, average handle time, and average time chats spent in the queue.

This report is very similar to the Inbound Report and the Email Report.

Figure 99. Calls Export Report

## EXPORT CALLS REPORT

This utility allows you to export call activity records and lead information from the database by selecting the date range, campaigns, in-groups, list Ids, user groups and statuses that you want to export. The file that is exported is in a tab-delimited text file format. The link to this report is only enabled if you have the Export Report user option set to 1. The fields that are exported are the following:

```
call_date,phone_number,status,user,full_name,campaign_id/in-
group,vendor_lead_code,source_id,list_id,gmt_offset_now,phone_code,phone_nu
mber,title,first_name,middle_initial,last_name,address1,address2,address3,c
ity,state,province,postal_code,country_code,gender,date_of_birth,alt_phone,
email,security_phrase,comments,length_in_sec,user_group,alt_dial/
queue_seconds,rank,owner,list_name,list_description,status_name
```

There are also additional options to export more fields using the EXTENDED options.

This report is for the downloading of leads and their dialer\_log and/or dialer\_closer\_log information by status, list\_id and date range. Report downloads to a flat text file that is tab delimited.

**Date Field** - This option will determine if the data exported will be by call log date or the entry date of when the lead was added to the system.

**Header Row** - If enabled, the first line in the exported data file will be a list of the headers for the data in the file.

**Recording Fields** - If enabled, the recordings for the latest phone call for the selected leads will be included in the export. If there is more than one recording, they will be pipe-delimited.

**Custom Fields** - If Custom List Fields is enabled on your system, and the leads you are exporting have custom fields values stored in the database, they will be included in the export.

**Per Call Notes** - If enabled at the campaign level, any Per Call Notes for the latest phone calls for the selected leads will be included in the export.

**Use DID Filter** - If enabled, this will only affect selection of leads from inbound calls, and will allow you to have only the leads that have inbound calls that arrived through the selected Inbound DIDs.

**VLC Filter** - If enabled, you will be able to have only the leads with the vendor\_lead\_code values you have selected be exported. We do not recommend using this option if you have unique VLC values for most of your leads.

**Export Fields** - STANDARD will include all of the lead fields that agents normally have access to, EXTENDED will include the following extra lead fields: entry\_date, called\_count, last\_local\_call\_time, modify\_date, called\_since\_last\_reset.

\*NOTE: If you have selected to use Entry Date or DID Filtering, EXTENDED will be automatically used.

**Exclude Call Log Data** - If you only want to export lead data, and no log or user information associated with the leads, then set this option to YES, change the -Date Field- to Entry Date and select -Lists-, -Statuses- and a -Campaign-, even though the Campaign will be ignored.

**Search Archived Data** - If you want to pull data from older leads and-or call logs that have been archived on your system, then you can select either or both of those options here.



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists**
  - Show Lists
  - Add A New List
  - Search For A Lead
  - Add A New Lead
  - Add DNC Number
  - Load New Leads
  - List Custom Fields
  - Copy Custom Fields
  - Drop Lists
- Scripts
- Filters
  - Inbound
- User Groups
- Remote Agents
- Admin

### Export Leads Report

This report pulls lead information for calls dialed in the selected date range. A lead is only exported once no matter how many calls were handled. The current lead status is used.

<b>Date Range:</b>	<b>Campaigns:</b>	<b>Inbound Groups:</b>	<b>Lists:</b>	<b>Statuses:</b>	<b>User Groups:</b>
2021-04-20 to 2021-04-20	---NONE--- ---ALL--- ALTTEST APPTAGNT APPTENG APPTSPA EMAILTST INACTIVE JDTEST MIKETEST SHIPAGNT SHIPENG SHIPFRE SVYTEST TEST22 TEST3 TESTCAMP TESTSPC	---NONE--- _STAY 123 25_CL_in 255CL_in 5001 9999999 AAA_ALL_TEST ACROUTE_191 AFTER_CALL_SURVEY AGENTDIRECT AGENTDIRECT_63 AGENTDIRECT_CHAT AGENTDIRECT9 AGENTDIRECTchat AGENTDIRECTemail ALL_HANGUP APRILTEST asdfasfdf ASK_AFTERCALL_SURVEY	---ALL--- 100 105 106 107 108 123 129 139 177 303 998 999 1101 1102 1201 1202 8199 9988 11113	---ALL--- 222222 A AA AB ADC ADCT AFAX AFTHRS AL AM B CALLBK CBHOLD CBK CBLEAD DC DCMX DEC DELXX DISCO DNC DROP HSTR INCALL	---ALL--- 5000 7457 7ADMIN ADMIN AGENTS APIUSER april etest Example INGROUP_REPORT INT_TEST MIKESGROUP NEWGRP stacey TEMPTTEST Tetest TEST_GROUP TRAINAGENTS video

**Date Field:** ? Call date

**Header Row:** ? YES

**Recording Fields:** ? NONE

**Custom Fields:** ? NO

**Per Call Notes:** ? NO

**Use DID filter:** ? NO

**Export Fields:** ? STANDARD

**Exclude Call Log Data:** ? NO

**Search archived data:** ? NO

**Figure 100. Export Leads Report**

## EXPORT LEADS REPORT

This is similar to the “EXPORT CALLS REPORT” in the information. However, rather than showing each individual call, it displays all the leads the calls were placed to. Each entry will only appear once, no matter how many times it was dialed during the reporting period. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

**Date Field** - This option will determine if the data exported will be by call log date or the entry date of when the lead was added to the system.

**Header Row** - If enabled, the first line in the exported data file will be a list of the headers for the data in the file.

**Recording Fields** - If enabled, the recordings for the latest phone call for the selected leads will be included in the export. If there is more than one recording, they will be pipe-delimited.

**Custom Fields** - If Custom List Fields is enabled on your system, and the leads you are exporting have custom fields values stored in the database, they will be included in the export.

**Per Call Notes** - If enabled at the campaign level, any Per Call Notes for the latest phone calls for the selected leads will be included in the export.

**Use DID Filter** - If enabled, this will only affect selection of leads from inbound calls, and will allow you to have only the leads that have inbound calls that arrived through the selected Inbound DIDs.

**VLC Filter** - If enabled, you will be able to have only the leads with the vendor\_lead\_code values you have selected be exported. We do not recommend using this option if you have unique VLC values for most of your leads.

**Export Fields** - STANDARD will include all of the lead fields that agents normally have access to, EXTENDED will include the following extra lead fields: entry\_date, called\_count, last\_local\_call\_time, modify\_date, called\_since\_last\_reset. NOTE: If you have selected to use Entry Date or DID Filtering, EXTENDED will be automatically used.

**Exclude Call Log Data** - If you only want to export lead data, and no log or user information associated with the leads, then set this option to YES, change the -Date Field- to Entry Date and select -Lists-, -Statuses- and a -Campaign-, even though the Campaign will be ignored.

**Search Archived Data** - If you want to pull data from older leads and-or call logs that have been archived on your system, then you can select either or both of those options here.



Agent Time Detail [?](#)

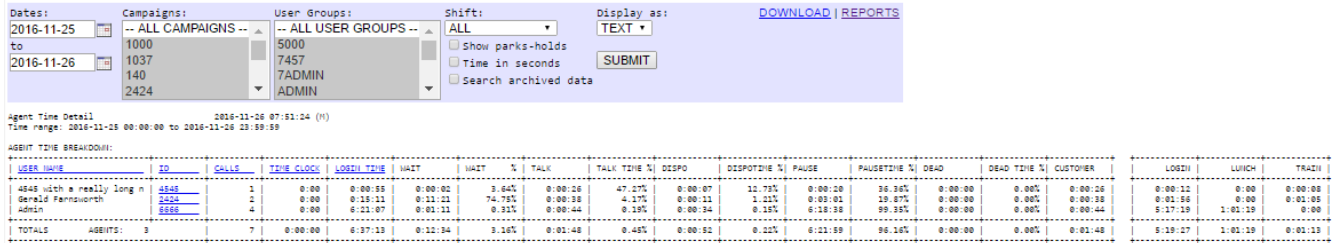


Figure 101. Agent Time Detail Report

## AGENT TIME DETAIL REPORT

The Agent Time Detail Report brings together all of the time-related metrics for an agent's activity into a single report. From Timeclock clocked-in time, to agent activity Pause, Wait, Talk, Dispo and Dead time, as well as all paused time broken down into it's pause codes in the section on the far right. This report can give you a better comparison tool of how an agent's time is being spent as compared to other agents. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

Here is an explanation of what each of the columns means on this report:

TIME CLOCK = Time the agent been logged in to the time clock.

AGENT TIME = Total time on the system (WAIT + TALK + DISPO + PAUSE).

WAIT = Time the agent waits for a call.

TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).

DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).

PAUSE = Time the agent is in pause mode (LOGIN + LAGGED + ...).

DEAD = Time the agent is in a call after the customer has hung up.

CUSTOMER = Time the agent is in a live call with a customer.

CONNECTED = Time the agent is waiting for a live call plus time in a live call with a customer.

- The next table is pause codes and their time.

LOGIN = The pause code when going from login directly to pause.

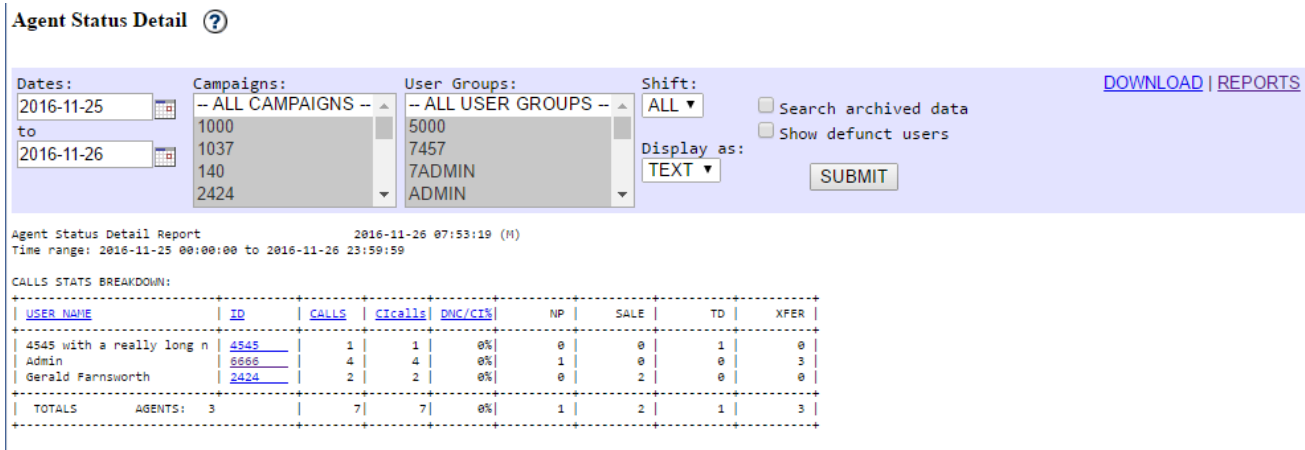
LAGGED = The time the agent had some network problem or similar.

ANDIAL = This pause code triggers if the agent been on dispo screen for longer than 1000 seconds.

and empty is undefined pause code.

VISIBLE = This is a tally of the amount of time the Agent Screen is being viewed by the agent in their web browser while they are logged in.

HIDDEN = This is a tally of the amount of time the Agent Screen is hidden from the view of the agent in their web browser while they are logged in.



**Figure 102. Agent Status Detail Report**

## AGENT STATUS DETAIL

The Agent Status Detail report is similar to the agent performance detail report, except it will not show you any time associated with the agent activity. However it will show you a field that can be very useful in outbound campaigns, DNC/CI% (Do Not Call take out of Contacts percentage). This is a good way to see what agents are setting many more leads to DNC as compared to other agents. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a [DOWNLOAD](#) link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns within this report mean:

CALLS = Total number of calls sent to the user.

CIcalls = Total number of call where there was a Human Answer which is set under Admin -> System Statuses.

DNC/CI% = How much in percent DNC (Do Not Call) per Human Answers.

And the rest is just System Statuses that the agent picked and how many, to find out what they means then head over to Admin -> System Statuses.

The Agent daily detail report is a report for only one user that can show what that user has dispositioned calls per day as across a range of dates. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a [DOWNLOAD](#) link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

**Agent Inbound Status Summary ?**

Dates: 2019-01-18 to 2019-03-21

Inbound groups: SALESLINE - Training Sales Line, SUPERT - Testing, TEST\_EMAIL\_EMPTY - test empty email in-group, TEST\_ERROR - Testing ERROR in-group, TEST\_IN - TEST inbound

User Groups: -- ALL USER GROUPS --, 5000, 7457, 7ADMIN, ADMIN

Shift: ALL

Display as: TEXT

Search archived data  
 Show defunct users

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Agent Inbound Status Summary Report 2019-03-21 12:13:38 (M)  
Time range: 2019-01-18 00:00:00 to 2019-03-21 23:59:59

INBOUND CALLS STATS BREAKDOWN:

USER NAME	ID	CALLS	ICalls	INC/CT%	DISHKX	NP	TD	XFER
Admin user	6666	39	38	0%	1	20	17	1
					2.6 %	51.3 %	43.6 %	2.6 %
Gerald Farnsworth	2424	3	3	0%	0	3	0	0
					0.0 %	100.0 %	0.0 %	0.0 %
TOTALS	AGENTS: 2	42	41	0%	1	23	17	1
					2.4 %	54.8 %	40.5 %	2.4 %

**Figure 103. Agent Inbound Status Summary Report**

**AGENT INBOUND STATUS SUMMARY REPORT**

This report is very similar to the Agent Status Detail Report, except it is only for inbound calls, and there are percentages shown for the statuses displayed.

**Agent Performance Detail ?**

Dates: 2016-11-25 to 2016-11-26

Campaigns: -- ALL CAMPAIGNS --, 1000, 1037, 140, 2424

User Groups: -- ALL USER GROUPS --, 5000, 7457, 7ADMIN, ADMIN

Users: -- ALL USERS --, 1000 - test agent with a looong name, 10000 - test user, 10001 - test user, 1002 - test agent

Only live agents  
 Show %s  
 Time in seconds  
 Show date breakdown  
 Search archived data  
 Show defunct users

Display as: TEXT  
Shift: ALL

[REPORTS](#)

Agent Performance Detail 2016-11-26 07:55:12  
Time range: 2016-11-25 00:00:00 to 2016-11-26 23:59:59

----- AGENTS Details -----

CALL STATS BREAKDOWN: (Statistics related to handling of calls only) [\[Download\]](#)

USER NAME	ID	CURRENT USER GROUP	HOT RECEIPT USER GRP	CALLS	TALK	PAUSE	PAUSAVG	WAIT	WAITAVG	TALK	TALKAVG	DISPO	DISPAVG	DEAD	DEADAVG	CUSTOMER	CUSTAVG	NP	SALE	TD	XFER
4545 with a res	4545	INTEGROUP	INTEGROUP	1	0:00:47	0:00:12	0:12	0:00:02	0:02	0:00:26	0:26	0:00:07	0:07	0:00:00	0:00	0:00:26	0:26	0	0	1	0
Admin	6666	ADICHI	ADICHI	4	0:04:22	0:02:53	0:29	0:01:11	0:18	0:00:44	0:11	0:00:34	0:30	0:00:00	0:00	0:00:44	0:11	1	0	0	3
Gerald Farnsworth	2424	ADICHI	ADICHI	2	0:03:16	0:01:29	0:45	0:00:58	0:29	0:00:38	0:19	0:00:11	0:06	0:00:00	0:00	0:00:38	0:19	0	0	0	0
TOTALS	AGENTS:3			7	0:08:25	0:03:34	0:33	0:02:11	0:19	0:02:48	0:15	0:00:52	0:07	0:00:00	0:00	0:02:48	0:15	1	0	1	3

PAUSE CODE BREAKDOWN: [\[Download\]](#)

USER NAME	ID	CURRENT USER GROUP	HOT RECEIPT USER GRP	LOG2H TIME	HOLD/PAUSE	PAUSE	LOG2H	LUICH	TRAZH
Gerald Farnsworth	2424	ADICHI	ADICHI	0:38:12	0:12:30	0:03:02	0:00:00	0:03:56	0:00
Admin	6666	ADICHI	ADICHI	0:21:07	0:02:29	0:18:38	0:00:00	5:17:19	1:01:19
4545 with a res	4545	INTEGROUP	INTEGROUP	0:00:55	0:00:35	0:00:20	0:00	0:00:12	0:00
TOTALS	AGENTS:3			6:37:13	0:15:14	6:21:59	0:00:00	5:19:27	1:01:19

**Figure 104. Agent Performance Detail Report**

**AGENT PERFORMANCE DETAIL REPORT**

The Agent Performance Detail Report is an accounting of an Agent's call-related time for a pre-defined shift that they are logged into a campaign. Basically, this report is a combination of data from the Agent Time Detail and Agent Status Detail reports. In addition to a tally of statuses that each agent dispositioned, the Detail report shows Pause time, wait time and disposition time. Together with talk time this gives a full breakdown of all Agents' time on the campaign for that shift. Dead time is taken out of the talk time for an agent, since talk time is really counting the amount of time that the customer record is on the agent's screen, not the phone call connected time. To get that number you need to take the talk time and subtract the dead time from it. The AM shift is coded as 3:00 AM to 5:45 PM server time while the PM shift is from 5:45 PM to 11:59 PM. You can also select the entire day and narrow the results down by user group. The top section will only include time involving a phone call. If an agent clicks to go active, then pauses, then goes active again without taking a call, that time will not be

included in the top section of this report.

Also in the Performance Detail report is a section showing the break down of pause time for the agent when logged in to Dialer . It is important to note that the total time in calls can be different from the total time an agent is logged in, the first section of this report will only show time associated with calls, not total time an agent is logged in like the second section shows.

This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

Here is an explanation of what the columns in this report mean:

CALLS = Total number of calls sent to the user.

TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).

PAUSE = Amount of time being paused in related to call handling.

AVG means Average so everything -AVG is for example amount of PAUSE-time divided by total number of calls: (PAUSE / CALLS = PAUSAVG)

WAIT = Time the agent waits for a call.

TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).

DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).

DEAD = Time the agent is in a call after the customer has hung up.

CUSTOMER = Time the agent is in a live call with a customer.

And the rest is just System Statuses that the agent picked and how many, to find out what they means then head over to Admin -> System Statuses.

- Next table is Pause Codes.

TOTAL = Total time on the system (WAIT + TALK + DISPO + PAUSE).

NONPAUSE = Everything except pause (WAIT + TALK + DISPO).

PAUSE = Only Pause.

- The last table is pause codes and their time (like Agent Time Detail).

LOGIN = The pause code when going from login directly to pause.

LAGGED = The time the agent had some network problem or similar.

ANDIAL = This pause code triggers if the agent been on dispo screen for longer than 1000 seconds.  
and empty is undefined pause code.

NOTE: (The top section of this report has statistics related to handling of calls only. What this means is that the top section will only include time involving a phone call. If an agent clicks to go active, then pauses, then goes active again without taking a call, that time will not be included in the top section of this report.)

Team Performance Detail

Date Range: 2016-11-25 00:00:00 to 2016-11-26 23:59:59

Campaigns: ALL CAMPAIGNS

Teams/User Groups: ALL USER GROUPS

Show additional statuses: NO ADDITIONAL STATUSES

Display as: TEXT

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--- TEAM: ADMIN - VECEIDAL ADMINISTRATION ---

agent ID	calls	leads	contacts	contact ratio	nonpause time	system time	talk time	sales	sales per working hour	sales to leads ratio	sales to contacts ratio	sales per hour	incomplete sales	cancelled sales	callbacks	first call resolution	average sale time	average contact time
ADMIN	4	1	0	0.00%	0:02:23	0:00:44	0:00:44	0	0.00	0.00%	0.00%	0.00	0	0	0	11	4.00	0:00:00
VECEIDAL ADMINISTRATION	2	1	0	0.00%	0:01:57	0:00:22	0:00:22	0	0.00	0.00%	0.00%	0.00	0	0	0	2	2.00	0:00:22
TOTALS	6	2	0	0.00%	0:04:20	0:01:06	0:01:06	0	0.00	0.00%	0.00%	0.00	0	0	0	13	3.00	0:00:10

--- TEAM: VECEIDAL - Sales Group ---

agent ID	calls	leads	contacts	contact ratio	nonpause time	system time	talk time	sales	sales per working hour	sales to leads ratio	sales to contacts ratio	sales per hour	incomplete sales	cancelled sales	callbacks	first call resolution	average sale time	average contact time
VECEIDAL - Sales Group	2	1	0	0.00%	0:00:30	0:00:22	0:00:22	0	0.00	0.00%	0.00%	0.00	0	0	0	2	2.00	0:00:22
TOTALS	2	1	0	0.00%	0:00:30	0:00:22	0:00:22	0	0.00	0.00%	0.00%	0.00	0	0	0	2	2.00	0:00:22

--- CALL CENTER TOTAL ---

agent ID	calls	leads	contacts	contact ratio	nonpause time	system time	talk time	sales	sales per working hour	sales to leads ratio	sales to contacts ratio	sales per hour	incomplete sales	cancelled sales	callbacks	first call resolution	average sale time	average contact time
VECEIDAL ADMINISTRATION	4	1	0	0.00%	0:04:16	0:01:06	0:01:06	0	0.00	0.00%	0.00%	0.00	0	0	0	11	4.00	0:00:00
VECEIDAL - Sales Group	2	1	0	0.00%	0:00:30	0:00:22	0:00:22	0	0.00	0.00%	0.00%	0.00	0	0	0	2	2.00	0:00:22
TOTALS	6	2	0	0.00%	0:04:46	0:01:28	0:01:28	0	0.00	0.00%	0.00%	0.00	0	0	0	13	3.00	0:00:10

Figure 105. Team Performance Detail

### TEAM PERFORMANCE DETAIL

Similar to the Agent Performance Detail Report, however this displays information for an entire User Group. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

This report contains some of the same information as the Agent Time Detail report, as well as several new fields. Also, the users are grouped together within their User Groups, and there is a User Group summary at the bottom of the results.

Here is an explanation of what the columns in this report mean:

- CALLS = Total number of calls sent to the user.
- LEADS = Total number of unique leads the user handled.
- CONTACTS = Total number of calls the user handled that were statused in a Customer Contact status.
- CONTACT RATIO = Percent of calls where a customer was contacted.
- NONPAUSE = Everything except pause (WAIT + TALK + DISPO).
- TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).
- TALK = Time the agent talks to a customer minus DEAD time.
- SALES = Total number of calls the user handled that were statused in a Sales status.
- SALES PER WORKING HOUR = Total number of sales divided by system time.
- SALES TO LEADS RATIO = Total number of sales divided by leads handled.
- SALES TO CONTACTS RATIO = Total number of sales divided by contacts.
- SALES PER HOUR = Total number of sales divided by talk time.
- INCOMPLETE SALES = Total number of calls statused as QCFAIL.
- CANCELLED SALES = Total number of calls statused as QCCANC.
- CALLBACKS = Total number of active or live callbacks for this user in the system.
- FIRST CALL RESOLUTION = Total number of calls handled divided by leads handled.
- AVERAGE SALE TIME = Total number of sales divided by the talk time for those sales calls.
- AVERAGE CONTACT TIME = Total number of contacts divided by the talk time for those contact calls.

Performance Comparison Report

Date: 2016-11-25 Campaigns: -- ALL CAMPAIGNS -- User Group: 1000 Users: 1000 - test agent with a bouncing name Shift: ALL Display as: TEXT Search archived data: [X] REPORTS

Agent Performance Comparison Starting Date: 2016-11-25

USER	CALLS	SALES	SALES PER HOUR	TIME	PAUSE	WAIT	TALK	DISPO	2 Days 400	3 Days 400	5 Days 400	10 Days 400	30 Days 400
1000	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1001	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1002	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1003	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1004	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1005	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1006	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1007	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1008	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1009	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1010	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1011	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1012	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1013	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1014	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1015	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1016	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1017	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1018	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1019	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
1020	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0
TOTALS	0	0	0.00	0:00:00	0	0	0	0	0	0	0	0	0

Figure 106. Performance Comparison Report

**PERFORMANCE COMPARISON REPORT**

This report contains some of the same information as the Team Performance Detail report, and allows scrutiny of users in the statistics of calls, sales, sales conversion percentage (sales/calls), sales per hour, and displays that data for today, yesterday, and 2, 3, 5, 10, and 30 days prior. This report can be queried by campaign, user group, and user.

Here is an explanation of what the columns in this report mean:

- CALLS = Total number of calls sent to the user.
- SALES = Total number of calls the user handled that were stautused in a Sales status.
- SALES CONVERSION PCT = Total number of sales divided by calls handled.
- SALES PER HOUR = Total number of sales divided by system time.
- TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).

Single Agent Daily

Dates: 2016-09-26 to 2016-11-26 Campaigns: -- ALL CAMPAIGNS -- Display as: TEXT User: 6666 Shift: ALL Search archived data: [X] DOWNLOAD | USER | USER STATS | REPORTS

SUBMIT

Agent Days Status Report: 6666 2016-11-26 08:18:56 (M)  
Time range: 2016-09-26 00:00:00 to 2016-11-26 23:59:59

LEAD STATS BREAKDOWN:

DATE	CALLS	Calls	DMC/CIN	TD	NP	ALTNUM	SALE	RQXFER	NZ	DCIX	WN	ZV14	XGH	CBTEST	CALLEK	XFER
2016-09-26	5	3	0%	2	1	0	0	0	0	0	0	0	0	0	0	0
2016-10-04	5	2	0%	2	0	2	0	0	0	0	0	0	0	0	0	0
2016-10-05	6	6	0%	4	2	0	0	0	0	0	0	0	0	0	0	0
2016-10-10	6	6	0%	5	1	0	0	0	0	0	0	0	0	0	0	0
2016-10-14	20	27	0%	23	4	0	0	0	0	0	0	0	0	0	0	0
2016-10-15	4	2	0%	1	0	0	1	0	0	0	0	0	0	0	0	0
2016-10-19	7	7	0%	5	2	0	0	0	0	0	0	0	0	0	0	0
2016-10-20	19	15	0%	3	0	0	12	0	0	0	0	0	0	0	0	0
2016-10-21	7	5	0%	1	4	0	0	0	0	0	0	0	0	0	0	0
2016-10-26	3	3	0%	0	0	0	0	3	0	0	0	0	0	0	0	0
2016-10-28	6	0	0%	0	0	0	0	0	0	1	0	0	0	0	0	0
2016-10-29	18	17	0%	13	4	0	0	0	0	0	0	0	0	0	0	0
2016-10-30	1	1	0%	1	0	0	0	0	0	0	0	0	0	0	0	0
2016-10-31	26	3	0%	2	1	0	0	0	0	0	0	0	0	0	0	0
2016-11-01	9	5	0%	4	1	0	0	0	0	0	0	0	0	0	0	0
2016-11-02	3	3	0%	3	0	0	0	0	0	0	0	0	0	0	0	0
2016-11-03	3	2	0%	1	1	0	0	0	0	0	0	0	0	0	0	0
2016-11-10	5	4	0%	4	0	0	0	0	0	0	0	0	0	0	0	0
2016-11-12	2	2	0%	0	2	0	0	0	0	0	0	0	0	0	0	0
2016-11-13	6	1	0%	1	0	0	0	0	0	0	0	0	0	0	0	0
2016-11-14	17	14	0%	2	1	0	0	0	10	1	1	0	0	0	0	0
2016-11-15	10	8	0%	2	2	0	0	0	4	2	0	0	0	0	0	0
2016-11-17	41	35	0%	25	5	0	0	1	4	1	0	1	1	1	0	0
2016-11-25	15	4	0%	0	1	0	0	0	0	0	0	0	0	0	0	3
TOTALS	254	175	0%	102	32	2	1	13	21	5	1	1	1	1	1	3

Figure 107. Single Agent Daily Report

**SINGLE AGENT DAILY DETAIL**

This report contains most of the same information as the Agent Status Detail report, except the Agent daily detail report is a report for only one user that can show what that user has dispositioned calls per day as across a range of dates. This report has some clickable column headers that allow you to sort the



data by the column you click on. There is a **DOWNLOAD** link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns in this report mean:

**CALLS** = Total number of calls sent to the user.

**CI CALLS** = Total number of calls the user handled that were stasured in a Customer Contact status.

**DNC CI PCT** = Total number of DNC stasured calls divided by the number of Customer Contact calls. (the rest of the fields are the statuses that the agent selected)

### SINGLE AGENT DAILY DETAIL

This report is similar to the Single Agent Daily report except it only shows the time columns.

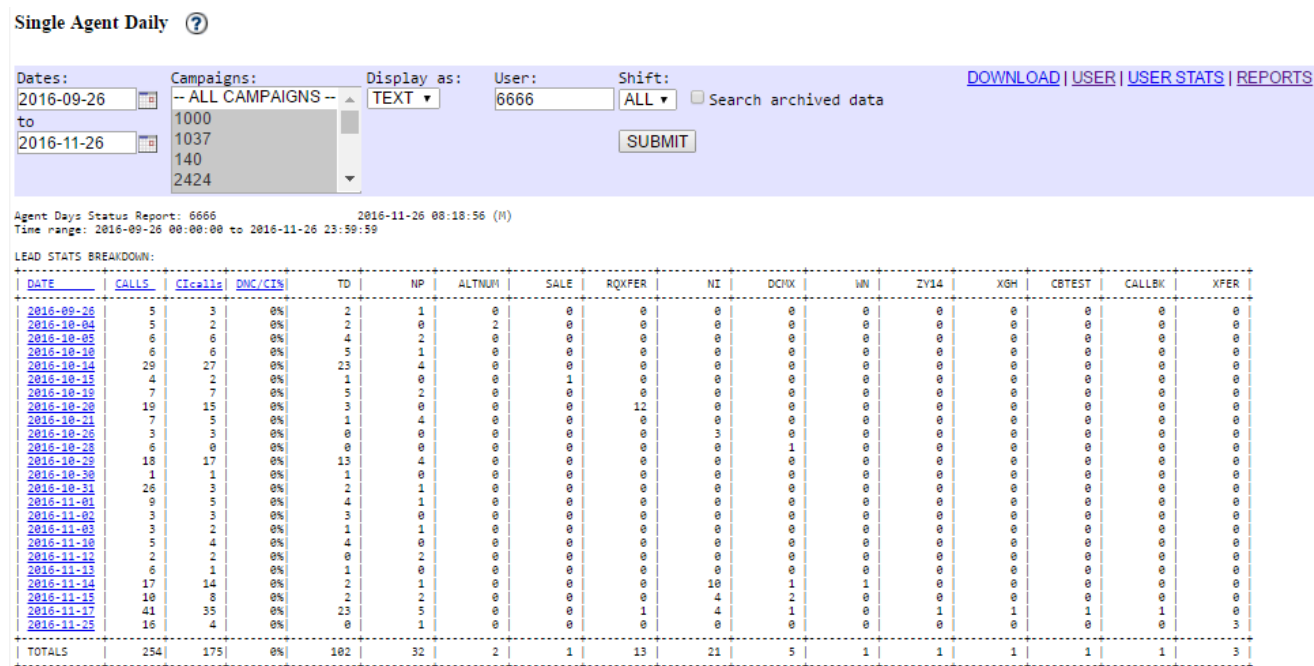


Figure 108. Single Agent Daily Time Report

### SINGLE AGENT DAILY TIME

This report is similar to the Agent Time Detail report, except for only one agent across a range of days. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a **DOWNLOAD** link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns in this report mean:

**PAUSE** = Amount of time for the agent being paused.

**WAIT** = Time the agent waits for a call.



TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).  
 DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).  
 DEAD = Time the agent is in a call after the customer has hung up.  
 CUSTOMER = Time the agent is in a live call with a customer.  
 TOTAL = Total time of these (PAUSE + WAIT + TALK + DISPO).

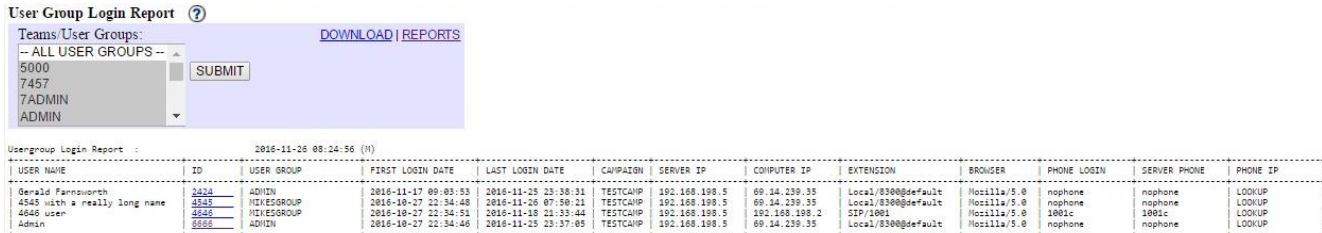


Figure 109. User Group Login Report

### USER GROUP LOGIN REPORT

This displays login data for each in a selected user group. It shows the user name, user ID, user group, first login date and time, along with the most recent login date & time, campaign, server IP address, computer IP address, phone extension, browser & version, phone login, server phone, and phone IP address.

Here is an explanation of what the columns in this report mean:

- FIRST LOGIN DATE = The earliest date this user logged in to the agent screen.
- LAST LOGIN DATE = The most recent date this user logged in to the agent screen.
- CAMPAIGN = The most recent campaign this user was logged in to.
- SERVER IP = The most recent server this user logged in to.
- COMPUTER IP = The most recent computer this user used to log in to the agent screen.
- EXTENSION = The most recent phone this user used to log in to the agent screen.
- BROWSER = The most recent web browser version this user used to log in to the agent screen.
- PHONE LOGIN = The most recent phone login this user used to log in to the agent screen.
- SERVER PHONE = The most recent server phone account this user was logged in through.
- PHONE IP = The IP address of the phone during the most recent agent screen session.

### User Group Hourly Report ?

Date:    
 Start time: :00:00  
 End time: :59:59

Campaigns:   
 05000  
 1000  
 1037  
 140

Teams/User Groups:   
 5000  
 7457  
 7ADMIN  
 ADMIN

Display as:   
 Search archived data

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User Group Hourly Report: 2019-03-21 12:20:19 (M)  
 Time range: 2019-03-21 10:00:00 to 2019-03-21 12:59:59  
 User groups: --ALL--  
 Campaigns: --ALL--

USER GROUP	AGENTS	11am to 12pm	12pm to 01pm
ADMIN	2	2	1
TOTALS	2	2	1

Figure 110. User Group Hourly Report

### ***USER GROUP HOURLY REPORT***

This report gives hourly count of distinct agents per user group, with totals. For single days only.

### User Group Detail Hourly Report ?

Date:    
 Start time: :00:00  
 End time: :59:59

Campaigns:   
 05000  
 1000  
 1037  
 140

Teams/User Groups:   
 5000  
 7457  
 7ADMIN  
 ADMIN

Search archived data  
 Display as:

[DOWNLOAD](#) | [REPORTS](#) | [v1](#)

User Group Detail Hourly Report: 2019-03-21 12:21:14 (M)  
 Time range: 2019-03-21 10:00:00 to 2019-03-21 12:59:59  
 User groups: --ALL--  
 Campaigns: --ALL--

USER GROUP	11am to 12pm	12pm to 01pm
ADMIN	2424	6666
ADMIN	6666	
TOTALS	2	1

Figure 111. User Group Detail Hourly Report

### ***USER GROUP DETAIL HOURLY REPORT***

This report is similar to the User Group Hourly Report, except it will provide a list of every user that handled a call within the hours shown in the report.

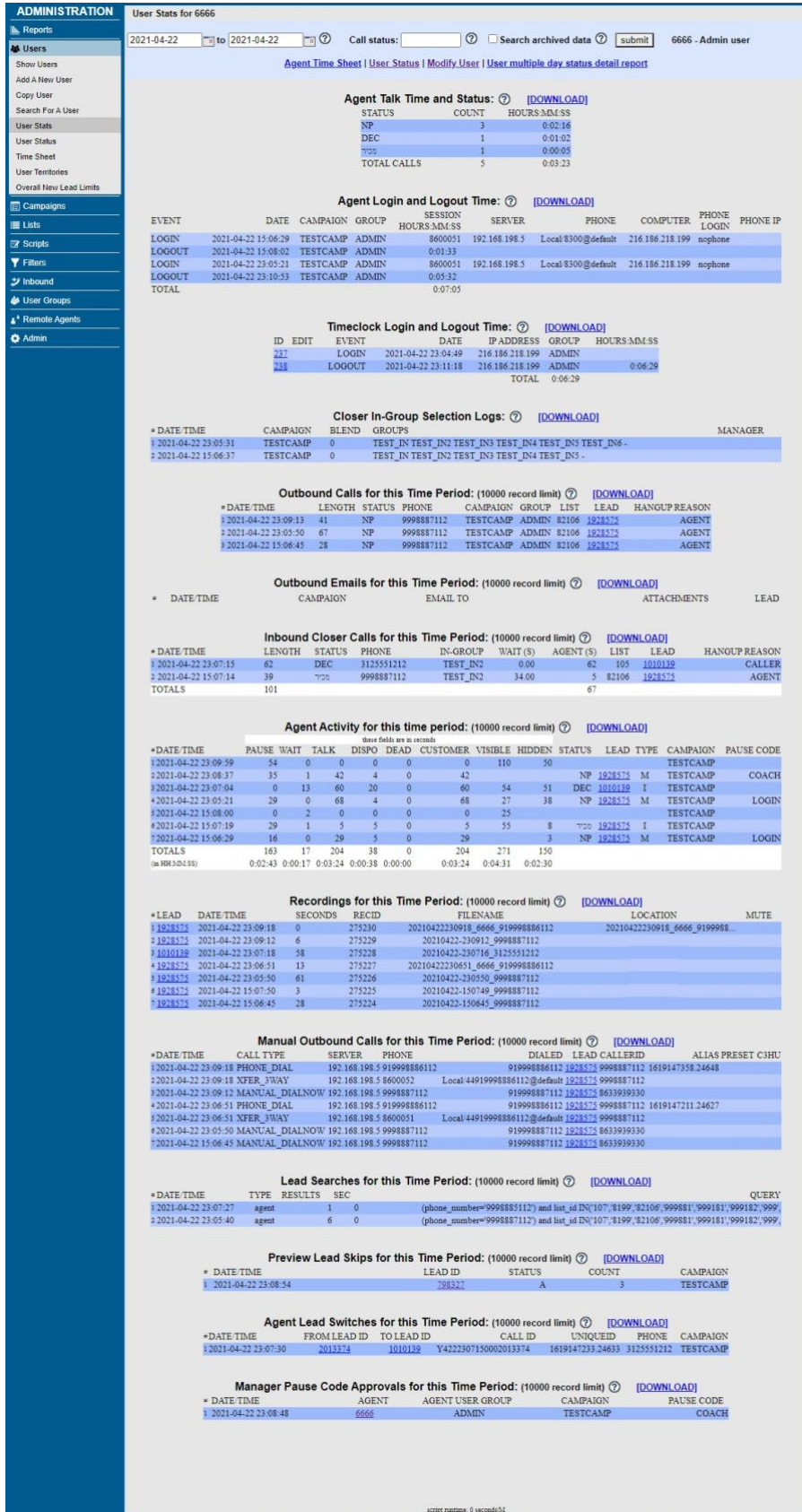


Figure 112. User Stats

## USER STATS

This page is a collection of the following reports: AGENT TALK TIME AND STATUS, AGENT LOGIN/LOGOUT TIME, TIMECLOCK LOGIN/LOGOUT TIME, CLOSER IN-GROUP SELECTION LOGS, OUTBOUND CALLS FOR THIS TIME PERIOD, INBOUND/CLOSER CALLS FOR THIS TIME PERIOD, AGENT ACTIVITY FOR THIS TIME PERIOD, RECORDINGS FOR THIS TIME PERIOD, MANUAL OUTBOUND CALLS FOR THIS TIME PERIOD, LEAD SEARCHES FOR THIS TIME PERIOD, PREVIEW LEAD SKIPS FOR THIS TIME PERIOD, AGENT LEAD SWITCHES FOR THIS TIME PERIOD and MANAGER PAUSE CODE APPROVALS FOR THIS TIME PERIOD. They can be queried for one or a string of days. All reports on this page can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link. For a more detailed explanation of the data included in this report, see the “User Stats Page” section earlier in this manual.

Figure 113. User Time Sheet

Agent Time Sheet for: 6666  
 Date: 2016-11-26 User ID: 6666  Search archived data

Agent Time Sheet 2016-11-26 08:41:37  
 Time range: 2016-11-26 00:00:00 to 2016-11-26 23:59:59

----- AGENT TIME SHEET: 6666 - Admin -----

[Call Activity Summary](#)

FIRST LOGIN: 2016-11-26 08:34:24  
 LAST LOG ACTIVITY: 2016-11-26 08:37:49

-----

TOTAL LOGGED-IN TIME: 0:03:25

TIMECLOCK LOGIN/LOGOUT TIME: [\[DOWNLOAD\]](#)

ID	EDIT	EVENT	DATE	IP ADDRESS	GROUP	HOURS:MINUTES
205		LOGIN	2016-11-26 08:27:15	69.14.239.35	ADMIN	
206		LOGOUT	2016-11-26 08:33:00	69.14.239.35	ADMIN	0:05:45
207		LOGIN	2016-11-26 08:33:45	69.14.239.35	ADMIN	
208		LOGOUT	2016-11-26 08:41:30	69.14.239.35	ADMIN	0:07:45
TOTAL						0:13:30

## USER TIME SHEET

This report will show you the login, logout and call summary time details for a single user for a single day. This report may take some time to load if your system has many agents or has a large call history to search through. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

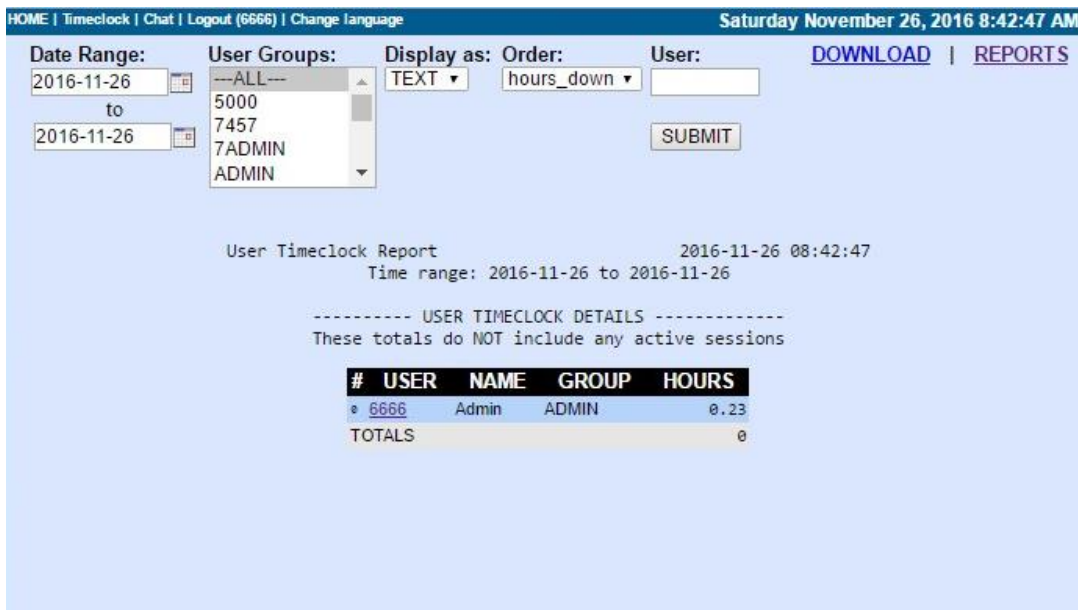
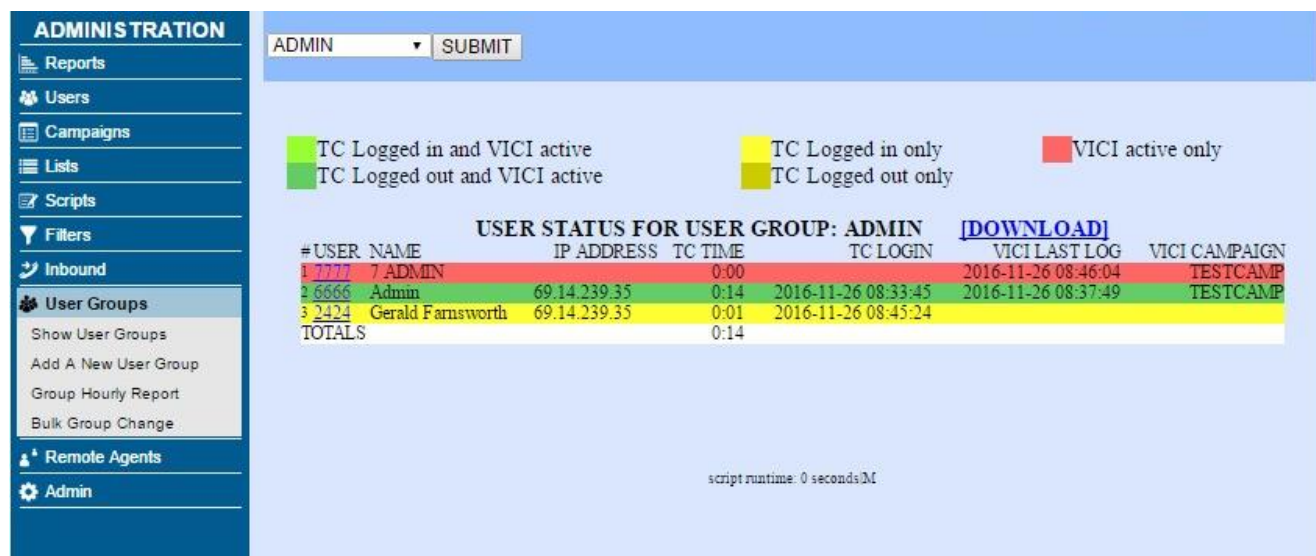


Figure 114. User Timeclock Report

### USER TIMECLOCK REPORT

This report allows you to see timeclock data for one user or many users grouped by user group. It is important to note that this report will only use data from timeclock records that have been closed(records that contain a LOGOUT entry). You can sort this report by various fields and there will be a total at the bottom. This report can be exported to a spreadsheet capable .TXT document, by selecting the [DOWNLOAD](#) link.

Figure 115. User Group Timeclock Status Report



### USER GROUP TIMECLOCK STATUS REPORT

This is a current-day report that can show you by user group whether users are logged into the Timeclock and/or the Dialer Agent interface. This is a good report to show a manager what agents



need to log in or log out of the timeclock at the beginning or end of a shift.

**Figure 116. User Timeclock Detail Report**

**User Timeclock Detail Report** [?](#)

Dates: 2016-11-26 00:00:00 to 2016-11-26 23:59:59

User Groups: -- ALL USER GROUPS --  
 5000  
 7457  
 7ADMIN  
 ADMIN

Display as: TEXT

Shift: ALL

[DOWNLOAD](#) | [REPORTS](#)

---

User Time-Clock Detail 2016-11-26 08:47:28  
 Time range: 2016-11-26 00:00:00 to 2016-11-26 23:59:59

AGENT TIME-CLOCK DETAIL:

USER NAME	ID	USER GROUP	TIME CLOCK	TIME CLOCK PUNCHES
Gerald Farnsworth	2424	ADMIN	0:00:00	08:45:24
4545 with a rea	4545	MIKESGROUP	0:00:39	08:44:10 08:44:49
Admin	6666	ADMIN	0:13:30	08:27:15 08:33:00 08:33:45 08:41:30
TOTALS	AGENTS: 3		0:14:09	

**USER TIMECLOCK DETAIL REPORT**

This report is queried by User Group, and displays time clock information for each user in the indicated group. It displays their User Name, User ID, User Group, Time Clock (or total time clocked in), and each time clock punch. This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

ADMINISTRATION		ADMIN CHANGE LOG: (Last 5000 records)						
	ID	DATE TIME	USERIP	SECTION	TYPE	RECORD ID	GROUP DESCRIPTION	GOTO
Reports	62	2018-11-25 07:55:06	6888	09.14.239.35LANGUAGES	ADD	<a href="#">spanish_all</a>	--ALL-- ADMIN ADD LANGUAGE	<a href="#">GOTO</a>
Users	61	2018-11-25 02:42:21	6888	09.14.239.35CONTACTS	ADD	1	--ALL-- ADMIN ADD CONTACT	<a href="#">GOTO</a>
Campaigns	60	2018-11-25 02:39:09	6888	09.14.239.35LABEL	MODIFY	<a href="#">sales_label</a>	--ALL-- ADMIN MODIFY LABEL	<a href="#">GOTO</a>
Lists	59	2018-11-25 02:38:58	6888	09.14.239.35LABELS	ADD	<a href="#">sales_label</a>	--ALL-- ADMIN ADD LABEL	<a href="#">GOTO</a>
Quality Control	58	2018-11-25 02:37:48	6888	09.14.239.35TTS	MODIFY	<a href="#">last_name_yes_no</a>	--ALL-- ADMIN MODIFY TTS	<a href="#">GOTO</a>
Scripts	57	2018-11-25 02:37:42	6888	09.14.239.35TTS	ADD	<a href="#">last_name_yes_no</a>	--ALL-- ADMIN ADD TTS	<a href="#">GOTO</a>
Filters	56	2018-11-25 02:35:30	6888	09.14.239.35MOH	MODIFY	<a href="#">salesline</a>	--ALL-- ADMIN MODIFY MOH	<a href="#">GOTO</a>
Inbound	55	2018-11-25 02:35:25	6888	09.14.239.35MOH	MODIFY	<a href="#">salesline</a>	--ALL-- ADMIN MODIFY MOH	<a href="#">GOTO</a>
User Groups	54	2018-11-25 02:35:07	6888	09.14.239.35MOH	ADD	<a href="#">salesline</a>	--ALL-- ADMIN ADD MOH	<a href="#">GOTO</a>
Remote Agents	53	2018-11-25 02:26:21	6888	09.14.239.35VOICEMAIL	ADD	101	--ALL-- ADMIN ADD VOICEMAIL	<a href="#">GOTO</a>
Admin	52	2018-11-25 02:22:19	6888	09.14.239.35STATUSGROUPS	ADD	<a href="#">list_101_statuses</a>	--ALL-- ADMIN ADD STATUS GROUP STATUS	<a href="#">GOTO</a>
	51	2018-11-25 02:21:52	6888	09.14.239.35STATUSGROUPS	ADD	<a href="#">list_101_statuses</a>	--ALL-- ADMIN ADD STATUS GROUP	<a href="#">GOTO</a>
	50	2018-11-25 02:20:28	6888	09.14.239.35SYSTEMSTATUSES	MODIFY	<a href="#">SALE</a>	--ALL-- ADMIN MODIFY SYSTEM STATUS	<a href="#">GOTO</a>
	49	2018-11-25 02:20:11	6888	09.14.239.35STATUSCATEGORIES	ADD	<a href="#">SALES</a>	--ALL-- ADMIN ADD STATUS CATEGORY	<a href="#">GOTO</a>
	48	2018-11-25 01:13:52	6888	09.14.239.35SHIFTS	ADD	<a href="#">9TO5MONFRI</a>	--ALL-- ADMIN ADD SHIFT	<a href="#">GOTO</a>
	47	2018-11-25 01:01:08	6888	09.14.239.35HOLIDAYS	ADD	<a href="#">2018_christmas</a>	--ALL-- ADMIN ADD HOLIDAY	<a href="#">GOTO</a>
	46	2018-11-25 00:53:45	6888	09.14.239.35GROUPALIASES	ADD	<a href="#">test_group_alias</a>	--ALL-- ADMIN ADD GROUP ALIAS	<a href="#">GOTO</a>
	45	2018-11-25 00:52:03	6888	09.14.239.35PHONEALIASES	ADD	102	--ALL-- ADMIN ADD PHONE ALIAS	<a href="#">GOTO</a>
	44	2018-11-24 23:33:00	6888	09.14.239.35REMOTEAGENTS	ADD	10000	--ALL-- ADMIN ADD REMOTE AGENT	<a href="#">GOTO</a>
	43	2018-11-24 23:32:47	6888	09.14.239.35USERS	ADD	10000	--ALL-- ADMIN ADD USER	<a href="#">GOTO</a>
	42	2018-11-24 23:23:53	6888	09.14.239.35USERGROUPS	ADD	<a href="#">AGENTS</a>	--ALL-- ADMIN ADD USER GROUP	<a href="#">GOTO</a>
	41	2018-11-24 23:22:22	6888	09.14.239.35FILTERPHONEGROUPS	ADD	2125551212	--ALL-- ADMIN ADD NUMBER TO FILTER PHONE GROUP INBOUND_BLACKLIST	<a href="#">GOTO</a>
	40	2018-11-24 23:22:05	6888	09.14.239.35FILTERPHONEGROUPS	ADD	<a href="#">INBOUND_BLACKLIST</a>	--ALL-- ADMIN ADD FILTER PHONE GROUP	<a href="#">GOTO</a>
	39	2018-11-24 23:18:34	6888	09.14.239.35CALLMENUS	ADD	<a href="#">survey_question_2</a>	--ALL-- ADMIN ADD CALL MENU	<a href="#">GOTO</a>
	38	2018-11-24 23:05:58	6888	09.14.239.35DIDS	ADD	2	--ALL-- ADMIN ADD DID	<a href="#">GOTO</a>
	37	2018-11-24 22:52:38	6888	09.14.239.35CAMPAIGNS	MODIFY	<a href="#">TESTCAMP</a>	--ALL-- ADMIN MODIFY CAMPAIGN DETAIL	<a href="#">GOTO</a>
	36	2018-11-24 22:52:28	6888	09.14.239.35INGROUPS	ADD	<a href="#">TEST_CHAT</a>	--ALL-- ADMIN ADD INBOUND GROUP	<a href="#">GOTO</a>
	35	2018-11-24 22:52:28	6888	09.14.239.35INGROUPS	MODIFY	<a href="#">TEST_CHAT</a>	--ALL-- USER INGROUP VIGA ADD	<a href="#">GOTO</a>
	34	2018-11-24 22:48:08	6888	09.14.239.35CAMPAIGNS	MODIFY	<a href="#">TESTCAMP</a>	--ALL-- ADMIN MODIFY CAMPAIGN DETAIL	<a href="#">GOTO</a>

Figure 117. Admin Changes Log Listing

### ADMIN CHANGES LOG

This set of reports allows you to look at all of the changes made by users of the Administration interface, which you can view by administrative section and record altered. You can also view the database query that was used to make the change and see the differences highlighted between the old version and the new.

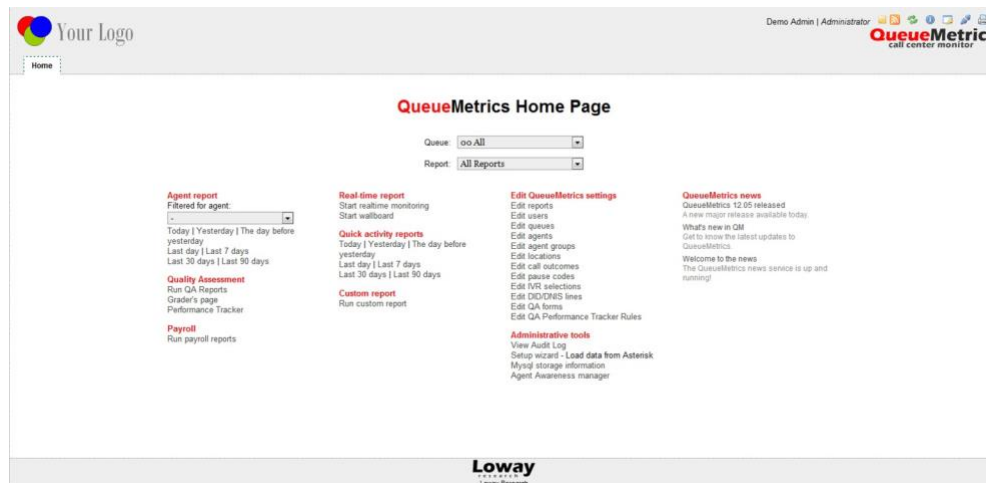


Figure 118. QueueMetrics Reports

## QUEUOMETRICS REPORTS

Queuemetrics offers a suite of reports that are integrated directly with Dialer . They offer most of the same data available in existing Dialer reports, but visualize the data in different ways. Queuemetrics is a paid service and is not open-source or free. Please see their website (<http://queuemetrics.com/>) for packages, pricing, and licensing information. The Dialer Group can also install and configure it for your Dialer system(<http://dialer .com>)

NOTE: This QueueMetrics service will require a separate database server and java web server.

NOTE: As of QueueMetrics version 21 (April 2021) and Dialer version 2.14-854a, we no longer actively support newer QueueMetrics versions' newer features.





**Figure 119. CallCard Search**

## ***CALLCARD SEARCH***

If CallCard is active on your system, this page allows the admin to search for calling card information by PIN, card ID, run, batch or sequence. It displays the card, or cards that match the given criteria. The results show the card ID, status, balance, creation date, activation date, last used date, void status, and additional detail.

## **Server-Specific Reports**

The second set of reports are specific to only one Dialer server on your network. For most of these reports there is a table with the report title at the top and the server name across the left side where you can click on the report that you want. Also, in this table you can find the server load average, CPU load %, number of active Asterisk channels and the highest hard drive use percentage for each server.

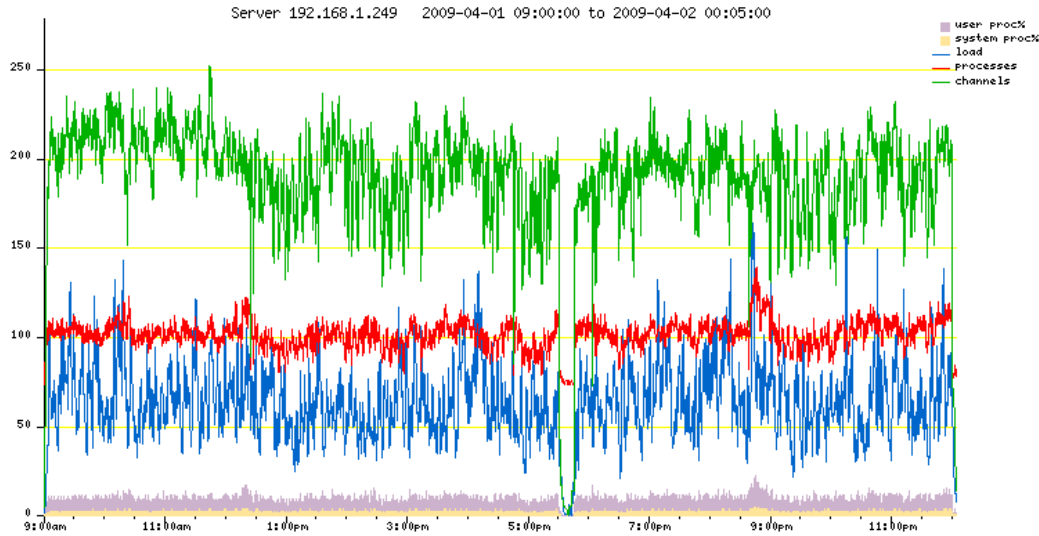
Date/Time Range:  to  Server:   [REPORTS](#)

```

VICIDIAL: Server Performance                2009-04-02 00:42:02
Time range: 2009-04-01 09:00:00 to 2009-04-02 00:05:00

----- TOTALS, PEAKS and AVERAGES
Total Calls in/out on this server:         106113
Total Off-Hook time on this server (min):  39928.11
Average/Peak channels in use for server:    187.4519 / 278
Average/Peak load for server:              63.5744 / 197
Average USER process cpu percentage:       5.8136 %
Average SYSTEM process cpu percentage:     2.2263 %
Average IDLE process cpu percentage:       91.9567 %

----- LINE GRAPH:
rows: 11143  tick: 120 minutes  scale: 30 minutes
  
```



**Figure 120. Server Performance Report**

### ***SERVER PERFORMANCE REPORT***

You will need to check with your systems administrator to see if the Server Performance Report is installed on your system. This report does not tell you anything about campaigns or agent performance, but instead focuses on the system performance of the physical server that is running Dialer . The information is gathered on the server once every 5 seconds and the report period can be defined from one day to another using the following date-time format: YYYY-MM-DD HH:MM:SS. The summary information at the top will show you the number of calls that this server handled during the shift, the total off-hook minutes for the shift, the average number of Asterisk channels that were in use at any given time, the average system load, the peak system load and the breakdown of the average USER, SYSTEM and IDLE processor time percentages. The graph portion gives you a graphical representation of the number of processes, system load, number of Asterisk channels and the USER/SYSTEM system processor time percentage. This report can give you a better idea of when you may need more capacity or what the load on the system might be when you may have experienced a group of problems with your system. **SYS ADMIN NOTE:** to activate system logging: make sure that the Administration section server record has the System Performance setting set to Y. This is one of the few reports that can not be downloaded.

Administration: Maximum System Stats

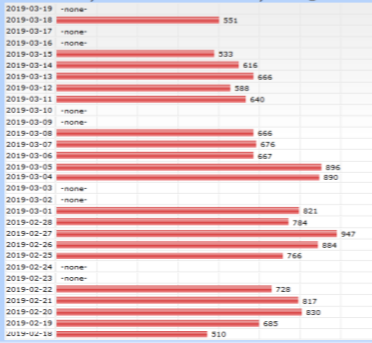
2019-02-18 to 2019-03-19 ADJUST DATE RANGE

[DOWNLOAD ALL](#)

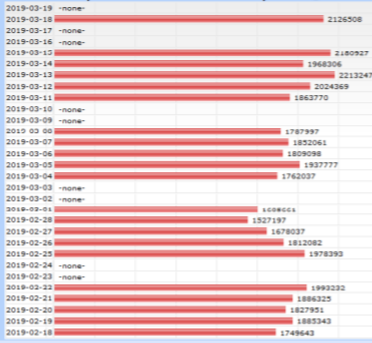
30 Day total call count in and out for this system



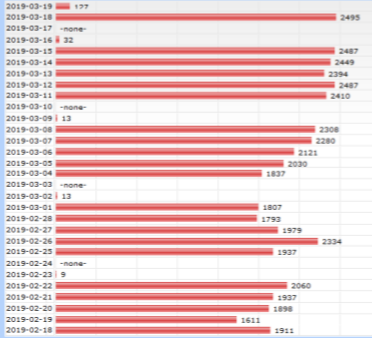
30 Day total inbound call count for this system



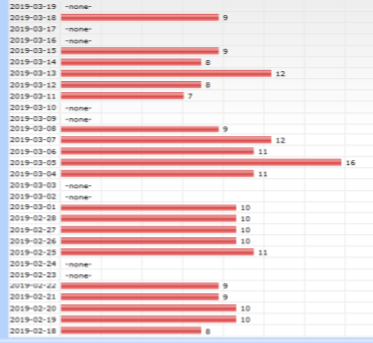
30 Day total outbound call count for this system



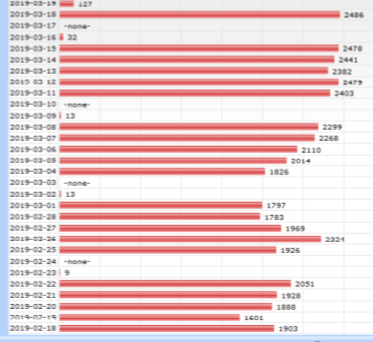
30 Day most concurrent calls in and out for this system



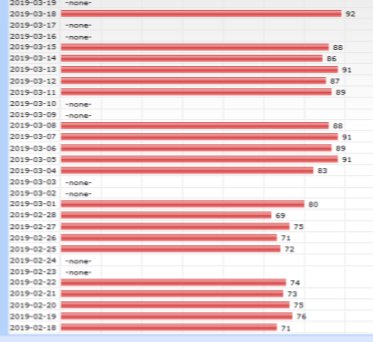
30 Day most concurrent calls inbound total for this system



30 Day most concurrent calls outbound total for this system



30 Day most concurrent agents for this system



VERSION: 2.14-666  
 BUILD: 1919-103  
 © 2019 VeriCall, Inc.

Figure 121. Maximum System Stats

## MAXIMUM SYSTEM STATS

This report displays a data and a bar graph for each of the last 30 days. It tracks:

- TOTAL CALL COUNT IN AND OUT FOR THIS SYSTEM
- TOTAL INBOUND CALL COUNT FOR THIS SYSTEM
- TOTAL OUTBOUND CALL COUNT FOR THIS SYSTEM
- MOST CONCURRENT CALLS IN AND OUT FOR THIS SYSTEM
- MOST CONCURRENT CALLS INBOUND TOTAL FOR THIS SYSTEM
- MOST CONCURRENT CALLS OUTBOUND TOTAL FOR THIS SYSTEM
- MOST CONCURRENT AGENTS FOR THIS SYSTEM.

**Figure 122. Server-Specific Time on VDAD Report**

```

SERVER: 192.168.198.5
Agents Time On Calls      2016-11-26 09:04:12  DEFAULT | REPORTS

```

STATION	PHONE	USER	SESSIONID	CHANNEL	STATUS	CALLTIME	MINUTES	CAMPAIGN	FRONT
8300@defau	callin	6666	8600053		INCALL	09:03:45	0:27	TESTCAMP	

1 agents logged in on server 192.168.198.5

---

```

Server-Specific Real-Time Report      TRUNK SHORT: 0      2016-11-26 09:04:12

```

CHANNEL	STATUS	CAMPAIGN	PHONE NUMBER	CALLTIME	MINUTES
IAX2/cc352-4459	LIVE	TEST IN3	13125551212	09:04:05	0:07

1 calls being placed on server 192.168.198.5

████████ - LIVE CALL WAITING

## TIME ON VDAD Report

This report will show all Dialer activity on one single server, the agents logged in, their status, if they are on a call and the time on call as well as the numbers that are being dialed out (and their campaigns) and if there are any calls waiting for an agent.

## CLOSER INBOUND Time REPORT

This report is similar to the TIME ON VDAD report except it is for CLOSER or Inbound campaigns and will show the inbound group that the call came from.

## **PHONE-BASED Dialer FUNCTIONS**

There are a few functions within the Dialer suite that you can do through a phone connected to the Dialer system.

### **Generating audio prompts through a phone**

You have the ability to record audio prompts for Asterisk and Dialer to use just by using the phone. To record a new prompt just dial 8168 on your phone connected to your Dialer server. You will be prompted for an ID (which is 4321 followed by the pound key #). Once you are logged in, you will hear the recording instructions and after the beep you can start recording your message. When you are done recording you should press the pound(hash) key. You will then be presented with three options: press 1 to save the prompt, press 2 to listen to the prompt you just recorded or press 3 to re-record the prompt. Once you accept the recording, the filename of the recording will be played back to you. The system will start with 85100001 as the first ID and will increment by one every time you go to record a new file. Within Dialer these recordings can be used in several fields including:

- The Answering Machine Message field in the Campaigns screen
- The Safe Harbor Exten field in the Campaigns screen
- The Drop Exten field in the In-Groups screen
- The after-hours message for In-Groups
- The agent alert message for In-Groups
- Several places in the Campaign Survey options

### **Blind Monitoring Dialer Agents**

One other function that can be used through a Dialer -attached phone is to listen in on a Dialer Agent and the customer they are talking to without them hearing that you are on the line monitoring them. To do this, simply dial 0 plus the session ID(for example: 0 + 8600051 so you would dial 08600051) of the Agent you wish to monitor. You can find the listing of Agents and their associated sessionIDs on the Real-time report (also known as "Time On VDAD") page. To finish, simply hangup the phone.

Another method of blind monitoring allows you to go from session to session on a single Dialer server without hanging up in between. If you dial 8162 you will hear "extension" and you will be able to dial 8 + the last 3 digits of the agent's session ID to blind monitor the agent(i.e. 8051 for session 8600051). Then when you want to move to another session you press any digit on your phone and you will be brought back to the "extension" prompt. You can also barge in using this dial-in, but you would dial 99 + the last 3 digits of the agent's sessionID (i.e. 99051 for 8600051).

Your systems Administrator may have also set up shortcut numbers to dial if you have a multi-server system to be able to monitor agents on all servers across your Dialer setup, check with your Administrator to see if they have done this on your system.

See also the web-based method of monitoring through the Real-Time Report mentioned above.

## ***Manager Barge-in on Dialer Agent Calls***

It is even easier for a Manager to enter a conversation with an Agent and their Customer by simply dialing the Agent's session ID(for example 8600051) into their Dialer -attached phone. Once the number is dialed, both parties will hear the entry tone(the droplet sound, or double tone on older systems) and the Manager can talk to and listen to both of the other parties on the call. To finish, simply hang up the phone.

## ***Call Count Limits***

This section will go over the various "Call Count Limit" features available within Dialer , including:

- Lifetime Lead Call Count Limits
- Daily Call Count Limits
- 24-Hour Call Count Limits (added at svn/trunk revision 3484)

### **What are "Call Count Limits" exactly?**

Call Count Limits are restrictions placed on the number of times a lead(or phone number in some cases) can be called by the system. They are configurable on a per-Campaign basis. There are currently three types of Call Count Limits offered as options within Dialer : Lifetime Lead Call Count Limits, Daily Call Count Limits, 24-Hour Call Count Limits. Below is more detail on how each of these are configured and how they work.

### **LIFETIME LEAD CALL COUNT LIMITS**

Lifetime Lead Call Count Limits are a default feature within Dialer , meaning you do not have to enable anything in "Admin -> System Settings" to be able to use it. You can find the setting to enable this feature on the "Modify Campaign -> Detail" page listed as "Call Count Limit", and if this setting is set to '0', there will be no limit on the number of times a lead can be called in this campaign.

NOTE: A lead may go over this limit slightly if Lead Recycling or Auto-Alt-Dialing is enabled.

### **DAILY CALL COUNT LIMITS**

Daily Call Count Limits must be enabled on the "Admin -> System Settings" page(Enable Daily Called Count Limits) before you can configure them on a "Modify Campaign -> Detail" page. This setting will limit the number of calls that can be placed to a lead on a per-day basis, with each "day" beginning at midnight server-time, and if this setting is set to '0', there will be no limit on the number of times a lead can be called each day within this campaign. Once a lead has reached this set limit, if the lead is selected to be dialed again, the called-since-last-reset flag on the lead will be changed to 'Y' and the call will not be dialed. If you want to raise this daily limit during the day, you might need to reset your lists to be able to dial the leads that hit the previous limit earlier in the day.

There is also another setting on the campaign detail page related to this Daily Call Count Limit feature: Daily Call Limit Manual. If the Daily Call Count Limit is enabled, this setting will determine if manual dial calls will be counted and or restricted in the daily call count limit. The DISABLED option will not count manual dial calls or restrict them as part of the daily call count limits, only auto-dial calls would

be counted restricted. If one of the COUNT options is used, then manual dial calls would be included in the daily call counts. If one of the RESTRICT options is used, then manual dial calls would be restricted as part of the daily call count limit. Default of this setting is DISABLED.

NOTE: This feature may conflict with Auto-Alt-Dial features if they are enabled on a campaign.

NOTE: This feature may conflict with Lead Recycling features if they are enabled on a campaign.

NOTE: This feature will not affect ANYONE Scheduled Callbacks, they can be auto-dialed even if the resulting call will go beyond the daily call count limit.

## **24-HOUR CALL COUNT LIMITS** (added at svn/trunk revision 3484)

24-Hour Call Count Limits must be enabled on the "Admin -> System Settings" page(Enable 24-Hour Called Count Limits) before you can configure them on a "Modify Campaign -> Detail" page. This setting will limit the number of calls that can be placed to a lead or a phone number within the last 24 hour, with the time being based on the database server-time.

This setting is enabled by setting the "24-Hour Called Count Limit Method" option to either PHONE\_NUMBER or LEAD. If set to PHONE\_NUMBER, then before each call is placed, the system will look to see if the count of call attempts to that specific phone number is at or above the set maximum number of attempts, regardless of what lead the phone number is tied to. If set to LEAD, the system will only check to see if the lead is at or above the set maximum number of attempts.

The next setting on the campaign detail page related to this 24-Hour Call Count Limits is "24-Hour Called Count Limit Scope", which can be set to either SYSTEM\_WIDE or CAMPAIGN\_LISTS. If set to SYSTEM\_WIDE, then before each call is placed, the system will look to at all calls placed in the whole system to gather its count of the number of call attempts in the last 24 hours. If set to CAMPAIGN\_LISTS, the system will only gather the number of attempts made within the leads tied to the lists set to this specific campaign.

Another setting on the campaign detail page related to this 24-Hour Call Count Limits is "24-Hour Called Count Limit", which can be set to any number 0 or higher. This setting determines the number of calls that can be placed within 24 hours. For example, if this option is set to '1' and a call is placed to a lead at 11:01, then the next time that lead could be called is after 11:01 the next day. The default for this setting is '0'.

The last setting on the campaign detail page related to this 24-Hour Call Count Limits is "24-Hour Called Count Limit Override", where you can create a Settings Container of the "CALL\_LIMITS\_OVERRIDE" container type that will allow you to override the 24-Hour Called Count Limit for calls to specific states, based upon the area-code of the phone number being dialed. The area-code-to-state relationship is defined in the internal database which you can access by going to "Admin => System Settings => Phone Codes => Phone Codes". Default for this setting is DISABLED.

Here is an example CALL\_LIMITS\_OVERRIDE Container Entry that will work with this setting:

```
; Select one of the four methods below for how the state is determined:  
';state_areacode' will look only at the phone_code(country code) and the area-code of the phone  
number to determine the state  
';state_areacode_postcode' will do the same as above, but it will also check to see if the postal code  
matches this state  
';state_areacode_postcode_state' will do the same as above, but it will also check to see if the lead's  
"state" field matches this state
```

; 'state\_areacode\_state' will do the same as the first option, but it will also check to see if the lead's "state" field matches this state  
; NOTE: for the last three options, if ANY of the selected criteria matches a state defined below, it will use that 24-hour call count limit.  
; If more than one entry matches, the lowest call count limit of the matching entries will be used.  
method => state\_areacode  
  
; One line per state, with fields separated by commas: the country abbreviation, state abbreviation and the 24-hour call limit for that state  
state => USA,FL,3  
state => USA,GA,4

NOTE: There is no manual dial override for this feature, it will affect all normal customer calls placed within this campaign.

NOTE: If you use this feature with Lead Recycling enabled and the 24-Hour call limit is reached for a recycled lead, the recycling count for that lead will reset to 0 after the 24-Hour call count limit time expires.

NOTE: If you use this feature with standard Auto-Alt-Dialing, you can add "TFHCCL" to the list of Auto-Alt-Dial statuses in your campaign if you want a rejected alternate phone number dials to trigger the dialing of the next alternate number(if available for the lead).

### **Why was the "24-Hour Call Count Limits" feature created?**

The short answer is "because of Florida". The long answer is, that in its 2021 legislative session, the Florida Legislature unanimously approved an extension of the existing Telemarketing Regulation law to include several new provisions:

- Reducing call times from 8am-9pm to 8am-8pm
- Limiting the number of call attempts to three(3) per 24-hours
- Requiring "Express Consent" of the people being called by auto-dialers or using recorded messages
- Increased penalties for violations
- Some other small changes

NOTE: There are dozens of exemptions for some of the above changes. For more information, consult a lawyer that specializes in telecom law.

You can read the actual text of the law at the following link:

<https://flsenate.gov/Session/Bill/2021/1120/BillText/er/HTML>

In summary, as of July 1, 2021, anyone calling consumers within Florida on Native Florida Areacode Phone-Numbers(more about that part later) will now need to follow the restrictions of placing no more than three(3) calls to any single phone number for the same issue within any 24-hour period. In our research into this new restriction, we could not find any other governmental body who used the "24-hour" wording for a call attempt limit. The UK has a 72-hour ban on dropped auto-dialed calls for being re-attempted, but that is not an overall attempt limit, and was rather simple to program. But since the "24-hour" wording was used, we could not simply have affected clients use the existing "Daily Call Count Limit" features, since there would be the possibility of running over the three(3) calls per-24-hours limit. So we had to create a whole new set of features to handle this(detailed above).



Now what about that "Native Florida Areacode Phone-Numbers" part? The law uses the wording "any area code in this state" ('this state' meaning Florida) which at the time we're writing this document means the 21 area-codes assigned to the state of Florida by NANPA. Based upon our analysis, this actually leaves out the roughly 15% of Florida citizens who have phone numbers originating in other area-codes. But, this does make the determination of whether you are calling someone affected by this law to be much simpler, since we can just use the existing areacode database within Dialer (mentioned above) to look up what state the areacode of the phone numbers you are calling belongs to. Since there is some debate as to whether the phone number's area-code is the only way to determine if you are calling a Floridian, we did add some features to the "24-Hour Called Count Limit Override" to allow it to also include whether a Florida zipcode or state is defined in the lead's record to have it also follow a state rule for Florida.

The conclusion of all of this is: If you place sales calls, and you call people in Florida, you should set up your system to use the new 24-Hour Call Count Limit feature. At the very least, you should set up a "24-Hour Called Count Limit Override" with one of the "state" entries being "state => USA,FL,3" so that you are not calling any of those phone numbers more than three(3) times in a 24-hour time period.



Figure 123. Admin Utilities Page

## Admin Utilities

The “Admin Utilities” link appears at the bottom of the main reports page if you are a level 9 user. This page contains Administrative utilities that may be useful for administrating and debugging your system.

### Old Help Page

This page shows all of the older HELP text in one single page.

### Server Versions

This page shows the server name, description, IP address, load, channels, disk space, time, version, last change time/date, and whether or not it is currently active.

## ***Settings Compare Utility***

This utility will allow you to compare the settings from two records in your system and see what settings are different between the two. Step 1, select the type of settings to compare, CAMPAIGNS, LISTS, IN-GROUPS, USERS, etc... Step 2, select the two entries that you want to compare. To start over, click the RESET link.

## ***Campaign Debug Page***

This page will allow you to select a campaign and see the back-end logging that is taking place and can help to debug issues on an auto-dial campaign.

## ***Dial Log Report***

This page shows the calls placed by one or more servers, for single day or series, separated by their SIP response codes. The report shows lead ID, server IP, call date, extension, channel, context, timeout, outbound caller-ID, SIP hangup cause code, unique ID, and SIP hangup reason for each call.

## ***Carrier Log Report***

This is a report that allows you to see all dial attempts and response codes of calls going out from your system, as well as offering you the ability to download those logs.

## ***Caller ID Log Report***

This report will provide a breakdown by caller ID of calls from specified campaigns and specified statuses within a date range. It's primary purpose is to show which caller IDs have been used by a campaign to better control use of Caller IDs in your campaigns. The fields in this report are fairly standard, with one exception:

**Log Second Diff** - The maximum number of seconds difference allowed between the call\_date value in the dialer \_log table and the call\_date value in the dialer \_dial\_log table for records from both tables with matching lead\_ids to be considered the same call.

## ***Hangup Cause Report***

This is a report that allows you to see the carrier hangup causes for all calls going out from your systems. You can also define only specific hangup causes to have displayed on the screen.

## ***SIP Event Report***

This report is only useful if you have enabled SIP Event Logging on your system(see the SIP Event Logging description in the Campaigns section in this manual for more information). This report will allow you to sort the SIP-messages for calls by several criteria. This report was used during the development of the campaign SIP Actions feature to help determine what calls were False Answer

Supervision, by sorting the Ring-Time UP and DOWN.

## ***AMD Log Report***

This report will show you the results of the built-in Answering Machine Detection function on calls placed from your dialers.

## ***Quality Control Report***

This report shows quality control call activity within user-selected parameters. If displayed as HTML, it will output each individual call with a header row that shows things like the call date, agent, campaign, call status, QC scorecard and QC result. Underneath that, each checkpoint in the scorecard applied to call will be displayed as individual rows with scores and comments per checkpoint. The report can also be downloaded as a CSV where each call will be a row in the resulting file with the checkpoint data appended to each row.

CALL DATE = The date range in which the call was originally made.

FINISH DATE = The date the QC agent who evaluated the call marked it as finished. This will automatically filter out unfinished calls if this is used, regardless of what QC statuses (see below) are selected.

CAMPAIGNS = The campaign the original call was made under.

QC STATUS = The current status of the call in the quality control system - this is NOT the call status from dialing.

USERS = The agent(s) who placed the original calls.

QC AGENTS = The agents who evaluated the call in the quality control system.

SHOW %s = If this box is checked, the scores given by the QC agents will be displayed as percentages instead of points.

SEARCH ARCHIVED DATA = If this is checked, the archived quality control log tables will be searched if they exist.

## ***Inbound DID Detail Report***

This report displays the details for every call received for a DID or a list of DIDs over a given time interval.

CALL DATE = The date and time the call arrived on your system.

DID EXTEN = The DID number your carrier sent this call to.

DID PATTERN = The DID pattern that your system used to route the call.

SERVER = The server that received the call on your system.

UNIQUEID = The server unique ID of the call.

CALL ROUTE = Where the call was routed. If there is a prefix of F\_, PF\_, PFR\_ on this value, then the call matched one of the filters set on the DID and it was routed accordingly. A prefix of MQ\_ indicates the DID Max Call Queue settings triggered. A prefix of NA\_ indicated the No Available Agents settings triggered.

DID ROUTE = Where the DID is currently routed to when a call reaches it.

DID ID = The internal system ID of the DID.

CID NUMBER = The CallerID Number as received from your carrier.

CID NAME = The CallerID Name as received from your carrier.

CHANNEL = The server channel ID of the call.

### ***Dialer KHOMP Admin Tool***

This utility only works if you have already configured a KHOMP SIP Gateway with your Dialer system. It helps you to code the KHOMP results for calls that are gathered to specific Dialer statuses.

### ***Asterisk Debug Page***

This report will show you the Asterisk output of the SIP Peers and Registry, the IAX Peers and Registry and the last 1000 lines of Asterisk CLI output, if enabled in your servers' settings.

### ***Export Calls Report Carrier***

This is a report is similar to the standard Export Calls report, except it will also include more details from the carrier logs for each log entry exported as well.

### ***URL Log Report***

This page shows records for each URL that has been requested by the system, Like Dispo Call URL and even agent screen WEBFORM button clicks, for the indicated date and time frame. It can include any or all of the URL scripting fields in Dialer .

### ***Webserver-URL Report***

This contain 3 separate URL reports. The Dialer User Log is designed to see where requests are going on a cluster with multiple web servers. It also logs the whole URL, so it's apparent which version of a web page the user is accessing on a system that for some reason may have more than one version loaded. The Dialer API Log displays the API's received in a given server for the time range selected. Finally, the Dialer Report Log shows total reports run, per web server, for the selected time range.

### ***Agent LAGGED Report***

This page displays 2 reports indicating agent lag on the system, for a set date & time frame. The first indicates the server IP of the dialer that experienced the lag, and the total number of time lag occurred. The Second displays the agent log ID, user ID, server IP, event time, lead ID, campaign, status, user group, dial method, and unique ID.

## ***User Group Login Report***

This page shows data for each agent that has logged into the system, by user group. It displays their name, user ID, user group, first login date, last login date, along with the most recent login data for the campaign, server IP address, computer IP address, extension, browser & version, phone login, server phone, and phone IP address.

## ***Agent Debug Log Report***

If agent debug logging is enabled in your System Settings, this report will show almost all button clicks and back-end AJAX call functions that have happened for one agent session across a time range. This report is incredibly detailed and can contain hundreds of entries per minute. It can be used to debug issues that an agent may be experiencing with their agent screen. The usual cause of these type of issues are the agent's network connection, the agent's workstation or an issue with the database server.

## ***User Logins Report***

This report will show the last login information for a user on the last several days that they logged into the system.

## ***Real-Time Monitoring Log Report***

This report enables level 9 users, users with Admin Utilities privileges, to search the logs of Dialer managers who utilized the monitoring capabilities of the real-time report. Searches can be done for date ranges, campaigns, managers, and agents being monitored, and the results can be sorted by any of the following data returned by the report.

START TIME = The time the manager started monitoring an agent

MANAGER = The manager who initiated the monitoring session

MANAGER SERVER = The IP address of the server the manager was monitoring from

MANAGER PHONE = The phone login the manager used to monitor the agent

MANAGER IP = The IP address of the computer the manager was monitoring from

AGENT MONITORED = The agent ID and name of the agent being monitored

AGENT SERVER = The IP address of the server the agent phone was operating from

AGENT STATUS = The dialer status of the agent at the time the monitoring session was initiated

AGENT SESSION = The session ID of the agent at the time the monitoring session was initiated

LEAD ID = The lead ID the agent was speaking to at the time the monitoring session was initiated. If the agent was not in a call at the time the manager started monitoring them, this value will be -0-

CAMPAIGN = The campaign ID the agent being monitored was placing calls from at the time they started being monitored

END TIME = The time the manager stopped monitoring the agent, ending the monitoring session

LENGTH = The total length in seconds of the monitoring session

TYPE = The type of monitoring session that the manager was running

### ***Agent Parked Call Report***

This report can be run for a single day and will show the number of calls parked by agent and per timeframe, as well as the average time on hold for all calls and the number of calls that dropped while the customer was on hold.

### ***Agent-Manager Chat Log***

This is a report that allows you to view and search the chat logs for internal chats within the system between Manager and Agents as well as Agents and Agents.

### ***API Log Report***

This report will display the API log entries for a set date and time range. You can also narrow the results by API User, Agent User, Function and Result.

### ***Recording Access Log***

This is a report that allows you to see which user has accessed which recordings at what times. You can search by access date and time or recording date and time, as well as by the user ID of the person accessing the recordings.

### ***Admin Report Log Viewer***

This page shows a list of the reports pulled from the system (5000 per page). It lists the report ID, time & date, user ID of the person that retrieved the report, their IP address, the report, and the time it took for the report to compile. If the report has taken a long time to run, the run time of the report in second will appear in a highlighted color. Long running reports can often cause system issues if you are not using a slave database server to run the reports on.

### ***Hangup Cause Report***

This is a report that allows you to see the carrier hangup causes for all calls going out from your systems. You can also define only specific hangup causes to have displayed on the screen.

### ***Admin Bulk Tools***

This page allows you to bulk copy and delete DID's, AC-CID-Campaign/CID-Group entries, and Users.

**DID Bulk Copy** - This will take and insert a list of numbers as inbound DIDs, copying the settings specified in the selected DID. DIDs should be between 2 and 20 digits in length. A duplicate check will be performed.

**DID Bulk Delete** - This will delete the selected DIDs from your system. You cannot delete the - default- DID. Doing so will break several parts of the system.

**AC-CID Bulk Add** - This allows you to paste in a listing of CIDs to insert into a campaign AC-CID list or CID Group list. There are three methods to choose from:

STATE LOOKUP - This will take a list of CIDs and insert them as Area Code Caller IDs into the selected campaign. The area code lookup is designed to work only with numbers in the North American Numbering Plan as it uses the first three digits of each CID. The description will automatically be filled with the appropriate US state abbreviation corresponding to the given CIDs 3-digit area code.

CSV - This will take a comma separated list in the format of NPA,CID,DESCRIPTION,ACTIVE and insert each line into the specified campaigns AC-CID list using the supplied values. For example, given a listing of 813,7271234567,Florida,Y will result in an AC-CID entry for area code 813 using the CID 7271234567 and a description of -Florida- with the status being active. Descriptions are limited to 50 characters. For CID Groups of a STATE type, use this format for CSV- STATE,CID,DESCRIPTION,ACTIVE. The -ACTIVE- column will only be used if the Active select list above is set to -Input-.

STATE FILL - Similar to the STATE LOOKUP method above, this will take a list of CIDs and insert them as AC-CIDs in the specified campaign but will also make an entry for each area code in a state based off the state the CID is in. For example, if given the CID 7271234567, 19 CID entries will be created with the same CID, one each for every area code in Florida. If you are inserting into a CID Group that is a STATE type, then you will not want to use the STATE FILL method. CIDs must be between 6 and 20 digits in length and only digits 0-9 are allowed. Optionally, you can have the AC-CIDs set to active upon insertion.

**AC-CID Bulk Delete** - This will delete the Areacode Caller ID entries you select from the next screen based on the campaign or CID group you select here. Setting Clear All CIDs to YES will bypass the AC-CID selection and wipe all AC-CIDs for the selected campaign or CID group.

**User Bulk Copy** - This will copy a sequential number of users beginning with the User Start ID and ending with the User Stop ID using the settings found in the source user. ID must be at least 2 characters in length and no more than 8. A duplicate check will be performed. Only numerals are allowed and ID cannot begin with a zero. The User Number, Password and Full Name will all be the same. Force PW Change will work for admin level users and is recommend for security reasons.

**User Bulk Delete** - This will delete the selected users from your system. For obvious reasons, you cannot delete the user you are logged in as. You can also not delete any users that are actively logged in as agents.

## ***Bulk Phone Insert Page***

This page allows you to bulk insert phone entries into the system, including options for automatically



creating Phone Aliases. There is no UNDO button for this utility, so it is best to test with only a few records before running it for a large number of phone inserts.

**Servers** - This is a list of the server IP addresses of existing servers in the system that you want the phone entries to be populated across. These must be valid IP addresses, they must be active in the system and you must put one per line in this text area input box.

**Phones** - This is a list of the phone extensions that you want to be created on all of the servers listed above. The phone extensions should be letters and numbers only, with no special characters and you must put one per line in this text area box.

**Registration Password** - This is the registration password that will be used for all of the phones that are created. For SIP and IAX2 protocol you should use a complex password for security reasons.

**Login Password** - This is the agent screen login password that will be used for all of the phones that are created.

**Create Alias Entries** - Setting this option to YES will create a phone's alias entry for each of the extensions listed above that will tie all of the same extension entries on each server together allowing phone login load balancing to work in the agent interface.

**Alias Suffix** - This is the suffix that will be added to the extension to form the phone alias id. For example, if the extension is cc100 and the alias suffix is x, then the phone alias id used for that would be cc100x.

**Client Protocol** - This is the phone protocol that will be used for all phones created when submitted. SIP, PJSIP and IAX2 are VOIP protocols that will create conf file entries to allow those phones to register on the servers.

**Local GMT** - This is the time zone that all of the phones will be created with. Do NOT adjust this value for Daylight Saving Time.

**Phone Context** - This is the dial plan context that this phone will use to dial out. If you are running a call center and you do not want your agents to be able to dial out outside of the Dialer application for example, then you would set this field to a dialplan context that does not exist, something like agent-nodial. default is default.

**Set As Webphone** - Setting this option to Y will attempt to load a web-based phone when the agent logs into their agent screen. Default is N. The Y\_API\_LAUNCH option can be used with the agent API to launch the webphone in a separate Iframe or window.

**Webphone Dialpad** - This setting allows you to activate or deactivate the dialpad for this webphone. Default is Y for enabled. TOGGLE will allow the user to view and hide the dialpad by clicking a link. This feature is not available on all webphone versions. TOGGLE\_OFF will default to not show the dialpad on first load, but will allow the user to show the dialpad by clicking on the dialpad link.

**Webphone Auto-Answer** - This setting allows the web phone to be set to automatically answer calls that come in by setting it to Y, or to have calls ring by setting it to N. Default is Y.

**Use External Server IP** - If using as a web phone, you can set this to Y to use the servers External IP to register to instead of the Server IP. Default is empty.

**Template ID** - Use this option to assign a phone template to all of the phone entries created by this bulk insert utility. Default is empty.

NOTE: Submitting this form will NOT trigger a conf file rebuild, you will need to do that manually from System Settings or the Modify Server pages.

## ***Basic Lead Management Tools***

This page allows you to move, update the status, or delete leads. The list must contain less than 100,000 leads and currently be inactive for changes to be made. The lists can be sub-divided by lead status and called count.

## ***Advanced Lead Management Tools***

This contains the same lead management tools (moving leads, deleting leads, and updating lead status), but with more query options. In addition to selecting by status and call count, leads can also be separated by country code, vendor lead code, source ID, owner, entry date, modify date, and security phrase. This also contains “Switch Callbacks”, a tool for changing agent-only callbacks to “everyone” callbacks in bulk. This will display a day (or range) and query for a both the entry date and callback date. Only lists that are inactive can be modified within this utility, unless the System Setting override option for this is enabled.

## ***List Split***

This is a utility that allows you to split a single list into multiple separate lists of a size that you select.

## ***List Merge***

This is a utility that allows you to combine multiple lists into a single list.

## ***Reset Campaign Lists***

This page allows you to reset all (or only active) lists on the indicated campaign. This saves time over resenting the lists individually.

## ***Callbacks Transferral Page***

This page allows you to move all the callbacks from one agent to another agent or to change them to ANYONE callbacks. This saves time over having to do this for each lead individually.

## **Callbacks Bulk Move**

This is complex utility that is used to move callbacks meeting a set of selected criteria to a new list and or a new lead status. It can also purge called records from the callbacks table.

**Campaigns with callbacks** -The current list of all campaigns having at least one callback - select one or more to move callbacks from these campaigns in bulk to new lists and or assign new statuses. This will combine with other selected criteria to make a final list of callbacks to move.

**Lists with callbacks** -All list IDs having at least one callback - select one or more to move callbacks from these lists in bulk to new lists and or assign new statuses. This will combine with other selected criteria to make a final list of callbacks to move.

**User groups with callbacks** -The current list of all user groups having at least one callback - select one or more to move callbacks from these user groups to new lists and or assign new statuses. This will combine with other selected criteria to make a final list of callbacks to move.

**Agents with callbacks** -The current list of all agents having at least one callback - select one or more to move callbacks from these agents to new lists and or assign new statuses. This will combine with other selected criteria to make a final list of callbacks to move.

**Purge called records** -If this box is checked, before the leads meeting the selected criteria are moved, the callbacks table will purge itself of all inactive records in the table. This includes records that have a status of INACTIVE, OR any record still in the callback table that is LIVE but whose status in the dialer \_list table is NOT listed as a callback, i.e. it has been called, lead has called in, lead dispo has been modified. The page will notify you how many leads will be purged before you confirm that you would like to proceed.

**Purge uncalled records** - If this box is checked, before the leads meeting the selected criteria are moved, the callbacks table will purge itself of all uncalled records in the table. This includes records that have a status of ACTIVE, OR any record still in the callback table that is LIVE but whose status in the dialer \_list table is still listed as a callback, i.e. it has not been called, has not called in, and has not had the lead dispo modified. The page will notify you how many leads will be purged before you confirm that you would like to proceed.

**Live and uncalled for over XX days** -Selecting a date range from this drop down menu will filter out any callback where the scheduled callback time is past the selected number of days from the current date and time. This will combine with other selected criteria to make a final list of callbacks to move.

**Transfer to List ID** -The list ID to which all callbacks will be moved. The move will occur on the records in dialer \_list table - the matching records in dialer \_callbacks will be removed.

**New Status** -The new dialer \_list status the selected callbacks will be updated to. This affects the dialer \_list table ONLY.

## ***Callbacks export***

This page is used to view and download a list of all scheduled callbacks based on the campaigns selected and the dates the callbacks are scheduled to be contacted.

**Scheduled callback dates** - The date the leads are scheduled to be called back.

## ***International DNC Loader***

The international DNC loader is used to upload and store DNC lists by country in the dialer database, which can then be used to scrub against in the lead loader. This feature requires that the "Enable International DNC" feature be turned on in the system settings.

A background script constantly runs and checks a user-defined location for files to load. This places them in a queue table, the contents of which are displayed in this interface. From here the user can see what files have been uploaded, are being processed, or are finished/cancelled.

Uploaded files can be processed by assigning them a country code, designating whether or not the uploaded file is meant to purge said country's current DNC list or append to it, and selecting the file format the DNC file follows.

Files are processed automatically when the user presses the "START FILE" button and their progress can be tracked. Or the file can be cancelled and removed from the queue.

For more information, see the doc: [http://dialer.org/docs/INTERNATIONAL\\_DNC\\_SCRUB.txt](http://dialer.org/docs/INTERNATIONAL_DNC_SCRUB.txt)

**DNC country code** - This is the list of countries a DNC gleaned from the "dialer \_country\_iso\_tld" table in the database. In order to process an uploaded file into a DNC suppression table, you must specify what country it is for here.

**DNC file action** - When a user wishes to process a DNC file here, they must specify if the uploaded file is meant to replace the existing data in the country's table (PURGE), or if the uploaded file should insert all new distinct leads in with the records already in the table (APPEND). If this is the first time a file is being loaded for a particular country, it doesn't matter which option is selected.

**DNC file layout** - This field tells the file processing script what kind of file is being loaded and where to look in the file for the phone numbers. The file formats displayed in the drop-down menu are gotten from the settings container "DNC\_IMPORT\_FORMATS", and formats should be defined or altered there.

**Start/cancel file** - If the user has properly defined a country code, file action, and file layout for an uploaded "READY" file, they can click the "START FILE" button to set the file status to "PENDING", which will cause it to be picked up and processed by the automated processing script. Or, they can click "CANCEL" to set the file status to "CANCELLED", which will cause the file to eventually be purged from the queue table and also erased from the DNC storage folder by the automated processing script.

## ***Custom Reports Admin Page***

This page allows you to add/modify/delete entries for custom report links that will appear on the main Reports page. You can even use this utility to append specific variables to existing reports so that you can use these custom links as a shortcut to frequently needed reports.

**Report Name** - The report name that the report will be referred to as in the system for purposes of user group access and slave server use in the system settings. The report name may not be the same as any other custom report, nor may it be the same name as one of the standard system reports.

**Domain** - The domain that the report is located at. This will be combined with the path name to make a complete URL to use as a link from the reports page. You may leave this blank when the report is located on the same server as the web admin and just use the path name field to make a local URL.

**Path name** - The path on the domain where the report is located. When the domain is blank it is assumed that the report is housed on the local web server.

**Preset constants** - Here is where a user can define a preset value to pass to the report when it is accessed from the custom report link. This is useful if the user is viewing a report that accepts multiple variables that change the report output and there is a certain set of report parameters the user frequently uses and they wish to save time by coming to the report with those values already set.

Variable name -The enters the variable name here. Names allow alphanumeric characters, underscores, and to a limited extent brackets. Brackets are used to pass an array to the report and should be placed at the end of the variable name, such as 'var\_name[]'. The interface will condense brackets by removing any characters within a pair of them, and will also remove unmatched brackets.

Value -Then, the user enters a variable value in the 'Value' field, either by selecting a pre-defined variable value or a custom value. With the exception of 'datetime' and 'filedatetime', all pre-defined variables are dates in yyyy-mm-dd format. The predefined values are: 'today' for today's date, 'yesterday' for yesterday's date, 'datetime' which is a timestamp in the format of 'yyyy-mm-dd hh:ii:ss', 'filedatetime' which is an all-numeric timestamp in the format 'yyymmddhhiiss', and 6/7/8/13/14/15/30days, all of which are the date 6/7/etc days ago. If the user would like to define their own value for the variable, they can set the value to 'Custom Value', then fill out the custom value in the field to the right. Click 'ADD' to add the variable name/value pair to the presets to include in the report. Values will be URL-encoded prior to being entered in the database.

**Current constants** - Any report constant the user has entered to add to the report is displayed here. They are not editable, but they can be removed by clicking 'REMOVE' and then re-entered.

**User Group** - This menu is where you select what user groups will be able to access this report. Agents must belong to a selected user group in order to see the link for it in the reports page.

## ***Send a Call With Custom CID Page***

This utility allows you to send out a phone call from a server on your system with a defined callerID number. This will only work if your carrier allows it.

## ***Speech Voice Lab Page***

This utility was created to allow for students in a call center school to all log into the system as agents, and then have a native language speaker log into this page to have their voice broadcast to all agents logged into a specific campaign so that they can hear the native speaker and then repeat as they are being recorded or monitored by teachers.

## ***Webphone Only Page***

This page allows anyone with access to the agent interface to log in and use the Zoiper Webphone if it is installed on your system.

## ***NANPA batch updater***

If the DNC.COM batch cellphone filter service is configured on your system, this utility will allow you to manually scrub inactive lists for cellphones.

**Currently running NANPA scrubs** -Displays a log of the currently running scrubs, including: Start Time, Leads Count, Filter Count, Status Line, Time to Complete, Field Updated, and Field excluded

**Inactive Lists** -Contains all the inactive lists, that are eligible to be scrubbed. A list can only be scrubbed if Active is set to N on the list.

**Field to Update** -Indicates which lead field will contain the scrub result -Cellphone, Landline, or Invalid-. If NONE is selected it will use the default field Country\_Code.

**Exclusion Field** -In conjunction with Exclusion Value allows administrators to indicate leads that are not to be scanned. This field indicates which list field contains the scrub result.

**Exclusion Value** -In conjunction with Exclusion Field allows administrators to indicate leads that are not to be scanned. This field indicates which scrub result -either Cellphone, Landline, or Invalid- should be ignored.

**List Conversions** -Administrators can indicate a list ID in any of the fields -Cellphone, Landline, or Invalid- and the scrub will move all the corresponding stamped leads to that list.

**Time until Activation** -allows The administrator to set how long, in the future, the scrub will occur.

**View Past Scrubs** --link at the bottom- Click to see a log of all previous scrubs, including: Start Time, Leads Count, Filter Count, Status Line, Time to Complete, Field updated, Field Excluded, and total leads in each category.

## VICIPHONE.COM INTEGRATION

Viciphone.com is a free and open-source WebRTC phone that works natively with Dialer .

There are multiple steps you need to take to get a WebRTC phone working with Dialer :

- Make sure all of your Asterisk servers are version 13 or higher
- You must have authentic SSL certificates for every Asterisk server and Webserver that agents will be logging into
- You will need to set up a conf file template for each phone entry in Dialer that you want to use as a WebRTC phone

More details on how to set up the VICIphone WebRTC phone can be seen on this website:

[https://viciphone.com/?page\\_id=346](https://viciphone.com/?page_id=346)

## **DNC.COM PHONE NUMBER FILTERING INTEGRATION**

DNC.com is a service provider that offers several different phone number filtering options. We have added a web admin utility to allow for direct filtering of lists on your Dialer system with a DNC.COM account, to allow for state, federal(FTC) and internal DNC lists as well as TCPA and Litigator Scrub direct through DNC.COM. We have also added an inbound scrubbing option for calls coming in through DIDs on your system.

DNC.COM is also offering a Free 15 day trial to Dialer users of their Real-time Integrated TCPA and DNC Safe Harbor lead scrubbing. For more information on this free offer, contact us ([http://www.dialer.com/?page\\_id=7](http://www.dialer.com/?page_id=7)).

For information on setting up list filtering and/or inbound call filtering with your DNC.com account, see this document: [http://dialer.org/docs/DNC-dot-COM\\_integration.txt](http://dialer.org/docs/DNC-dot-COM_integration.txt)

For information on the DNC.COM integration of batch cellphone filtering, see the TCPA chapter in this document.



# TILTX STIR/SHAKEN API (Call Shaper) INTEGRATION

This document covers the TILTX SHAKEN (Call Shaper) API service features and how they integrate into Dialer .

NOTE: you will need to use the Dialer svn/trunk revision 3449 or higher on all servers in your cluster to use this feature.

## What is the TILTX SHAKEN (Call Shaper) API service?

This service requires an AGI script to be run before each call is placed through your dialer(agi-TILTX\_SHAKEN.agi). It will tag the call with SIP Headers with the "X-TILTX-ID", "Identity" and "CAID" values that TILTX returns so your carrier can route the call properly. There are also optional service features that allow for a National Do-Not-Call(DNC) list check and a Disconnected-number check, as well as CallerID Number validation/replacement "NumberRisk" service.

### Reference TILTX URLs:

<https://tiltx.zendesk.com/hc/en-us/articles/360060683571-TILTX-Call-Shaper-Module>

<https://tiltx.zendesk.com/hc/en-us/articles/4402421951885>

## How to set up TILTX Call Shaper on your Dialer system:

**REQUIREMENT 1:** To use this feature, you will have to get a valid API Key from TILTX and create a new Dialer Settings Container entry with the Container ID of "TILTX\_SHAKEN\_API\_KEY"(Container Type: OTHER), and place only the TILTX API key into the Container Entry.

**REQUIREMENT 2:** You will need to have the Dialer svn/trunk revision 3449 or higher installed on all servers in your Dialer cluster.

**REQUIREMENT 3:** You will need to put a similar dialplan entry into your Carrier Dialplan BEFORE the line where the call is placed out through your carrier:

```
exten => _91NXXNXXXXXX,n,AGI(/var/lib/asterisk/agi-bin/agi-TILTX_SHAKEN.agi,${EXTEN:-10})-----${CALLERID(num)}-----YES----- )
```

NOTE: Here are the configurable CLI flags for the above AGI script:

1. Phone number being called (USE DIALPLAN VARIABLE like '\${EXTEN:-10}')
2. CallerID number being sent with call (USE DIALPLAN VARIABLE like '\${CALLERID(num)}')
3. (YES/NO) whether to speak error messages or not, default 'NO'
4. Settings Container ID(override) to use for TILTX API settings, default 'TILTX\_SHAKEN\_API\_KEY' if empty

NOTE: We suggest also adding a crontab entry(similar to the one below) to remove the /tmp files that are created by the TILTX API requests and responses:

```
0 6 * * * /usr/bin/find /tmp -maxdepth 1 -type f -mtime +0 -print | xargs rm -f
```

## New Dialer statuses used:

(if you are subscribed to these TILTX services, which you have to pay extra for)

ADCCAR - Disconnect Carrier-Defined  
DNCCAR - DNC Carrier-Defined

### **Advanced Options:**

You can override the hard-coded TILTX Call Shaper API "https://api.shaper.tiltx.com/Calls/shaper" by adding a second line to the Settings Container that looks like the following:

```
URL=>https://api.shaper.tiltx.com/Calls/shaper
```

### **Advanced Debug:**

To see that the SIP Headers are being set properly, add the following line to your dialplan(extensions.conf after the 8368 "Playback" line), then reload your Asterisk dialplan and place a test call through the campaign detail screen:

```
exten => 8368,n,Verbose("X-CIDNAME:${SIP_HEADER(X-CIDNAME)}, X-TILTX-ID:${SIP_HEADER(X-TILTX-ID)}, Identity:${SIP_HEADER(Identity)}, CAID:${SIP_HEADER(CAID)}")
```

## QUEUOMETRICS INTEGRATION

QueueMetrics is a proprietary pay-for statistical analysis program suite created by Loway Research to work with Asterisk-based call centers. Dialer fully integrates with the QueueMetrics statistical analysis package through its ability to log calls and agent activity to a queue\_log table in a MySQL database. Functionality includes logging of inbound, outbound and manual dial phone calls, agent login, logout and pause codes, as well as the queue activity of phone calls and whether they entered the system through a DID or IVR. Also, through some additional configuration, the QueueMetrics live monitoring and recording retrieval can also work with Dialer .

To configure Dialer to create logs for QueueMetrics to analyze, look at the Admin → System Settings section of this manual, and have your System Administrator read the QUEUOMETRICS.txt document in the Dialer installation docs directory.

It is recommended that if you have a large call center(over 100 seats) and you want to use QueueMetrics, that you should install it on a separate dedicated machine. For more information about QueueMetrics, go to: <http://www.queuemetrics.com/>.

The Dialer Group can also install and configure it for your Dialer system(<http://dialer.com>).

NOTE: As of QueueMetrics version 21 (April 2021) and Dialer version 2.14-854a, we no longer actively support newer QueueMetrics versions.

## ZOIPER WEBPHONE INTEGRATION

Zoiper offers a web-embedded phone in addition to its stand-alone soft-phone. The zoiper web phone is compatible with Microsoft Windows based agent systems only and only works with older versions of MS Internet Explorer and Firefox before 2017. The zoiper web phone is commercial software and is licensed by fully-qualified domain name (i.e. “testphone.dialer .org”), meaning that the server which serves web pages to that URL will be the only one that the web phone can be used from, and domain name wildcards are not allowed.

There are several places within the Admin web interface that are integrated with specific zoiper web phone features, such as the ability in Phones to define if the phone is to be a webphone, whether to use the server's external server IP, whether the phone will auto-answer when called and if the dialpad is usable or not.

We have also included the ability for the zoiper web phone to be displayed inside of the agent screen. It is loaded when the agent screen is loaded, and it can even be minimized while in use.

As of 2016, the Zoiper WebPhone will not work with newer versions of the Google Chrome or Microsoft Edge web browsers due to their discontinuation in supporting of the NPAPI featureset. The Zoiper Webphone does still work with Firefox and Microsoft Internet Explorer. Although, Firefox will only support it through mid-2018.

For more information on the zoiper web phone, go here: <http://www.zoiper.com/webphone/>

The Dialer Group is also an authorized reseller of Zoiper Webphone licenses, and we can install and configure them for your Dialer system([http://dialer .com](http://dialer.com)).

An alternative to the unsupported Zoiper Webphone is VICIphone, More details on how to set up the VICIphone WebRTC phone can be seen on this website: [https://viciphone.com/?page\\_id=346](https://viciphone.com/?page_id=346)

## CEPSTRAL INTEGRATION

Cepstral provides text to speech integration to Dialer . Depending on how your System Administrator has set up the integration on your server, Dialer can integrate with Cepstral in the following ways:

- Any of Dialer 's Campaign-related audio prompts can utilize TTS scripts
- Cepstral uses SSML to allow you to control aspects of speech such as pronunciation, volume, pitch, rate, etc.
- The speech scripting can utilize any of the default lead tables.

(for configuration information see tutorial - S. Brief overview of Cepstral Text To Speech software integration.)

Before purchasing the licenses from Cepstral, determine the number of channels needed, and the number of dialers it will be installed in. To integrate with Dialer it requires the purchase of 3 separate license. is based not only on the number of servers, but the number of concurrent channels (lines speaking at the same time), and voices (they can buy more than 1 voice if they need to). The TTS software is installed on each dialer that will be using the services.

1. the Voice license – Cepstral offers various speaking voice to suit different needs. This is purchased as a per server license. (the voice needs to be “8kHz – for Linux”)
2. The Channel license – The number of channels Cepstral may us concurrently to generate voice. This is purchased as a per channel license.
3. Save to file license – This is integral component in the Dialer 's TTS process. This is purchased as a per server license.

## ORECX OREKA INTEGRATION

Orex offers the Oreka open-source software suite providing advanced recording capabilities with Voice-over-IP systems like Dialer . Oreka will require additional configuration to work properly. It requires you to set up your Dialer servers in pairs (also known as “server twining”) to operate. Depending on how your System Administrator has set up the integration on your server, Dialer can integrate with Oreka in the following ways:

- It allows for the capture of the SIP audio and can handle audio compression
- Oreka can also capture the agent's screen, so every action on the call can be logged.

Please visit the Orex website (<http://www.orecx.com/web/index.php> ) for more information on their products & implementation.

Once you have OrecX installed and configured on your systems, here are the steps to configure Dialer to work with it:

(This assumes a two-dialer Dialer cluster)

- You have to set up one Dialer dialer server as "Active Agent Server" = Y, and the other as "Active Agent Server" = N.
- Your agent phones should only be set up on the Agent Server.
- If you are auto-dialing, you need to make sure that the Agent Server is set to “0” Max Trunks.
- For inbound calls, all calls need to be directed to the Non-Agent server only.
- Both servers need to reference each other in the "Active Twin Server IP" server settings.
- In the campaign settings, you need to enable "Extension Append CID".

# SANGOMA CALL PROGRESS DETECTION(CPD) INTEGRATION

**As of June 30<sup>th</sup>, 2017, Sangoma had set their CPD product as end-of-life, meaning that it is no longer available for sale. If the status of CPD changes, we will be sure to make note of it.**

**The following is for informational archival purposes only:**

Dialer is also integrated with the Sangoma/ParaXip CPD SIP gateway. This product is a proprietary Answering machine/Fax machine/Pre-Answer call progress detection engine that claims up to 95% accuracy in very fast detection of humans and machines on calls.

Your system administrator must set up the CPD software as well as patch Asterisk for this software to work(If you installed a ViciBox image then your system is already patched for CPD compatibility). Once it is set up, you can activate this on a per-campaign basis using the “CPD AMD Action” option in the Campaign Detail screen, you enable this setting either by setting it to DISPO which will disposition the call as (AA for Answering Machine or AFAX for Fax Machine) and hang it up if the call is being processed and has not been sent to an agent yet or by setting it to MESSAGE which will send the call to the defined Answering Machine Message for this campaign.

The CPD has the added benefit of lowering the Dropped/Answered percentage by identifying potentially dropped calls as not Human, meaning that you can exclude them from the results yielding a lower drop percentage.

One other added benefit is the ability to more accurately classify Pre-Answer call progress information like SIT tones and more detailed grouping of Disconnects and Congestion, which Asterisk is not capable of providing. This can give you a much more accurate picture of the status of your leads.

Sangoma CPD works as a SIP proxy server, and it works best on a separate machine from a Dialer installation. For scaling, it is best to limit a CPD server to 200 concurrent outbound calls on a single quad-core CPU system.

For more information on the Sangoma CPD, go to their website at: <http://www.sangoma.com> and look for the NetBorder Call Analyzer.

The Dialer Group is also an authorized reseller of SangomaCPD licenses, and we can install and configure them for your Dialer system(<http://dialer.com>).

# **KHOMP AMD & CALL PROGRESS DETECTION INTEGRATION**

In 2020, Dialer finished integrating with the KHOMP SIP gateway for advanced call progress and answering machine detection. This product is a proprietary SIP gateway device that contains a call progress detection engine.

For this integration to work, you will need to contact KHOMP to acquire their SIP gateway solution, and you will need to have your system administrator make some changes on each of the dialers in your Dialer system to be able to connect to the KHOMP SIP Gateway.

For more details on how the KHOMP integration works, and how to configure it, take a look at this PDF:

[http://dialer.org/docs/KHOMP\\_Documentation.pdf](http://dialer.org/docs/KHOMP_Documentation.pdf)

Additional information and troubleshooting suggestions can be found in the KHOMP\_CPD\_INTEGRATION.txt document



## RANKMINER VOICE ANALYTICS INTEGRATION

RankMiner Voice Analytics can help you make more sales by helping you to target the right leads. It can also operate as an automated layer of quality control for your agents.

RankMiner works by analyzing thousands of audio recordings of your call center operations, along with metadata about the call, including the final disposition. It then uses this data to create a profile for what a good call sounds like, and it uses that information to create reports and export lists of what callers should be targeted, or what agents should be focused on for improvements.

One of our Dialer clients used RankMiner to increase their sales by over 40% compared to the time before they started using RankMiner to better target their leadbase.

For more information on RankMiner, go to <http://rankminer.com/>

**Note: As of September 2020, RankMiner is no longer an operating company.**

## VTIGER INTEGRATION

Vtiger is a web-based Open-Source Customer Relationship Management(CRM) package. Depending on how your System Administrator has set up the integration on your server, Dialer can integrate with Vtiger in the following ways:

- Export users and user groups from Dialer to Vtiger
- Synchronize any user and user group changes made within Dialer to the Vtiger user and group
- Bulk import Accounts into Vtiger, because the built-in Vtiger lead importer cannot handle large imports. This functionality must be done by a system Administrator
- Daily synchronization of Account details from Vtiger back into Dialer
- Web Form lookup of Vtiger Accounts, Leads and Vendors from the Dialer agent screen
- Reactivation of deleted Accounts in Vtiger from Dialer web form search
- Ability to create new Account activity records upon opening the Vtiger Account from the Dialer Web Form, or automatically after every agent call attempt
- Dialer status synchronization after each call to set the siccode field in Vtiger to the last selected Dialer status
- Click-to-Dial phone numbers from the Vtiger Account and Account List screens to put the phone number into the same Dialer agent's screen to dial that phone number as a manual dial call

To configure Dialer to work with Vtiger, look in the Admin → System Settings section of this manual and have your System Administrator read the VTIGER.txt document in the Dialer installation docs directory. For Click-to-dial to function, you must have the API enabled on your system, and you must have created a user 1000 with API enabled. Dialer integrates only with the 5.0.4 and 5.1.0 versions of Vtiger(5.1.0 is preferred). For more information on Vtiger, go to: <http://www.vtiger.com/>

**NOTE: Vtiger integration is no longer under active development as part of the Dialer project as of several years ago. The three companies that had been sponsoring this development have all stopped using Vtiger in favor of other options.**

**Security Alert: Because of several large and frequent security exploits that have existed in Vtiger, as well as problems with scaling the database for Vtiger use, we no longer recommend Dialer integration with Vtiger in any situation.**

# Non-agent API document

This document describes the functions of an API(Application Programming Interface) for all functions NOT directly relating to the DIALER Agent screen. This functionality was rather limited at first, but critical functions are constantly identified and programmed into it. There is also an agent API script, that follows this section.

## Changes:

80724-1723 - First build  
90428-0208 - Added blind\_monitor function  
90513-1720 - Added sounds\_list function  
90721-1432 - Added rank and owner  
90904-1535 - Added moh\_list musiconhold function  
90916-2342 - Added vm\_list voicemail list  
91203-1140 - Added agent\_ingroup\_info feature  
91216-0331 - Added duplication check features to add\_lead function  
100118-0543 - Added new Australian and New Zealand DST schemes (FSO-FSA and LSS-FSA)  
100704-1148 - Added custom fields inserts to the add\_lead function  
100718-0245 - Added update\_lead function to update existing leads  
100723-1333 - Added no\_update option to the update\_lead function  
100728-1952 - Added delete\_lead option to the update\_lead function  
100924-1403 - Added called\_count as an update\_lead option  
101111-1536 - Added dialer\_hopper.source to dialer\_hopper inserts  
101117-1104 - Added callback and custom field entry delete to delete\_lead option  
101206-2126 - Added recording\_lookup and did\_log\_export functions  
110127-2245 - Added add\_user and add\_phone functions  
110306-1044 - Added add\_list and update\_list functions  
110316-2035 - Added reset\_time variable and NAMEPHONE dup search  
110404-1356 - Added uniqueid search parameter to recording\_lookup function  
110409-0822 - Added run\_time logging of API functions  
110424-0854 - Added option for time zone code lookups using owner field in add\_lead function  
110529-1220 - Added time zone information output to version function  
110614-0726 - Added reset\_lead option to update\_lead function(issue #502)  
110705-1928 - Added options for USACAN 4th digit prefix(no 0 or 1) and valid areacode filtering to add\_lead  
110821-2318 - Added update\_phone, add\_phone\_alias, update\_phone\_alias functions  
110928-2110 - Added callback options to add\_lead and update\_lead  
111106-0959 - Added user\_group restrictions to some functions  
120127-1331 - Small fix for plus replacement in custom fields strings for add/update\_lead functions  
120210-1215 - Small change for hopper adding vendor\_lead\_code  
120213-1613 - Added optional logging of all non-admin.php requests, enabled in options.php  
120326-1307 - Added agent\_stats\_export function  
120810-0859 - Added add\_group\_alias function, altered agent\_stats\_export function  
120912-2042 - Added user\_group\_status and in\_group\_status functions  
120913-1255 - Added update\_log\_entry function  
121116-1938 - Added state call time restrictions to add\_lead hopper insert function  
121125-2210 - Added Other Campaign DNC option and list expiration date option  
130328-0949 - Added update\_phone\_number option to update\_lead function  
130405-1538 - Added agent\_status function  
130420-1938 - Added NANPA prefix validation and timezone options  
130614-0907 - Added pause code to output of agent\_status function  
130617-2232 - Added real-time sub-statuses to output of agent\_status function  
140124-1057 - Added callid\_info function  
140206-1205 - Added update\_user function

140211-1056 - Added server\_refresh function  
140214-1540 - Added check\_phone\_number function  
140331-2119 - Converted division calculations to use MathZDC function  
140403-2024 - Added camp\_rg\_only option to update\_user function  
140418-1553 - Added preview\_lead\_id for agent\_status  
140617-2029 - Added dialer\_users wrapup\_seconds\_override option  
140812-0939 - Added phone\_number and vendor\_lead\_code to agent\_status function output  
150123-1611 - Fixed issue with list local call times and add\_lead  
150217-1404 - archive deleted callbacks to dialer\_callbacks\_archive table  
150309-0250 - Added ability to use urlencoded web form addresses  
150313-0818 - Allow for single quotes in dialer\_list and custom data fields  
150428-1720 - Added web\_form\_address\_three to add\_list/update\_list functions  
150430-0644 - Added API allowed function restrictions and allowed list restrictions  
150512-2028 - Added filtering of hash sign on some input variables, Issue #851  
150603-1528 - Fixed format issue in recording\_lookup  
150730-2022 - Added option to set entry\_list\_id  
150804-0948 - Added WHISPER option for blind\_monitor function  
150808-1438 - Added compatibility for custom fields data option  
151226-0954 - Added session\_id(conf\_exten) field to output of agent\_status, and added logged\_in\_agents function  
160603-1041 - Added update\_campaign function  
160709-2219 - Added lead\_field\_info function  
161020-1042 - Added lookup\_state option to add\_lead, added 10-digit validation if usacan\_areacode\_check enabled  
170204-0947 - Added phone\_number\_log function  
170209-1149 - Added URL and IP logging  
170219-1520 - Added 90-day duplicate check option  
170223-0743 - Added QXZ translation to admin web user functions text  
170301-1649 - Added validation that sounds web dir exists to sounds\_list function  
170409-1603 - Added IP List validation code  
170423-0800 - Added force\_entry\_list\_id option for update\_lead  
170508-1048 - Added blind\_monitor logging  
170527-2254 - Fix for rare inbound logging issue #1017  
170601-0747 - Added add\_to\_hopper options to update\_lead function  
170609-1107 - Added ccc\_lead\_info function  
170615-0006 - Added DIAL status for manual dial agent calls that have not been answered, to 4 functions  
171229-1602 - Added lead\_status\_search function  
180109-1313 - Added call\_status\_stats function  
180208-1655 - Added call\_dispo\_report function  
180331-1716 - Added options to update\_campaign, add\_user, update\_phone. Added function update\_did  
180916-1059 - Added check for daily list reset limit  
181214-1606 - Added lead\_callback\_info function  
190325-1055 - Added agent\_campaigns function  
190628-1504 - Added update\_cid\_group\_entry function  
190703-0858 - Added custom\_fields\_copy option to add\_list function  
190930-1629 - Added list\_description field to add\_list and update\_list functions  
191107-1143 - Added list\_info function  
191113-1758 - Added add\_dnc\_phone and add\_fpg\_phone functions  
191114-1637 - Added remove\_from\_hopper option to update\_lead function  
200331-1207 - Added list\_custom\_fields function  
200418-0837 - Added custom\_copy\_method option for the add\_list function  
200606-0938 - Added more settings to add\_list & update\_list  
200610-1447 - Added duration option to recording\_lookup function  
200622-1609 - Added more options to add\_phone and update\_phone functions  
200815-1025 - Added campaigns\_list & hopper\_list functions  
200824-2330 - Added search\_method BLOCK option for hopper\_list function  
201002-1545 - Added extension as recording\_lookup option, Allowed for secure sounds\_web\_server setting  
201106-1654 - Added campaign\_id option to agent\_stats\_export function  
201113-0713 - Added delete\_did option to update\_did function  
201201-1625 - Added group\_by\_campaign option to agent\_stats\_export function

210113-1714 - Added copy\_user function  
210209-2014 - Added add\_did function  
210210-1627 - Added duplicate check with more X-day options for add\_lead function  
210216-1415 - Added list\_exists\_check option for add\_lead function  
210217-1454 - Added menu\_id option for add\_did and update\_did functions  
210227-1116 - Added xferconf number options to update\_campaign, add\_list & update\_list functions  
210303-1802 - Added list\_exists\_check option for update\_lead function  
210316-2207 - Added lead\_all\_info function  
210319-1720 - Added special 'xDAYs' value option for callback\_datetime  
210320-2127 - Added 'custom\_fields\_add' option for update\_list function  
210322-1218 - Added display of bad wav file formats on sounds\_list function  
210325-2042 - Added more data output fields to agent\_stats\_export function  
210330-1633 - Added ability to use custom\_fields\_copy on update\_list on a deleted list\_id  
210401-1058 - Added 'custom\_fields\_update' option for update\_list function  
210402-1102 - Added 'custom\_fields\_delete' option for update\_list function  
210406-1047 - Added 'dialable\_count' option to list\_info function  
210517-1850 - Added phone\_code as modifiable field in update\_lead function  
210611-1610 - Added more variables for add\_did/update\_did functions  
210618-1000 - Added CORS support  
210625-1421 - Added BARGESWAP option to blind\_monitor function  
210701-2050 - Added ingroup\_rank/ingroup\_grade options to the update\_user function  
210812-2640 - Added update of live agent records for ingroup\_rank/ingroup\_grade in the update\_user function  
210917-1615 - Added batch\_update\_lead function  
211107-1556 - Added optional phone\_number search for lead\_all\_info function  
211118-1946 - Added 'delete\_cf\_data' setting to the update\_lead function  
220126-2116 - Added dispo\_call\_url and alt URL options for update\_campaign. Added 'update\_alt\_url' function  
220307-0937 - Added 'update\_presets' function  
220310-0825 - Added DELETE action to the 'update\_presets' function  
220902-0823 - Added dial\_status\_add/dial\_status\_remove options to update\_campaign function  
220920-0814 - Added more "XDAY" options to add\_lead duplicate checks  
221108-1849 - Added include\_ip option for agent\_status function  
230122-1821 - Added reset\_password option to update\_user function

API Functions use the 'function' variable

NOTE: Just as with the Agent API, the non-agent API requires the user and pass of a valid api-enabled dialer\_users account to execute actions.

NOTE: The API is able to use HTTPS if your webserver is configured to use HTTPS.  
For example, all VICIhost accounts are able to use HTTPS for API functions

Example response if user permissions do not allow the function attempted:

ERROR: auth USER DOES NOT HAVE PERMISSION TO USE THIS FUNCTION - 6666|add\_lead

## ***API functions:***

### **version**

shows version and build of the API, along with the date/time and timezone

Example URL strings for API calls:

[http://server/dialer /non\\_agent\\_api.php?function=version](http://server/dialer /non_agent_api.php?function=version)

Example responses:

VERSION: 2.4-34|BUILD: 110424-0854|DATE: 2011-05-29 12:19:22|EPOCH: 1306685962|DST: 1|TZ: -5|TZNOW: -4|

## **sounds\_list**

outputs a list of audio files from the audio store

NOTE: api user for this function must have user\_level set to 7 or higher

**OPTIONAL FIELDS-**

format - format of the output(tab, link, selectframe)

stage - how to sort the output(date, size, name)

comments - name of the field to populate

Example URL strings for API calls:

[http://server/dialer /non\\_agent\\_api.php?](http://server/dialer /non_agent_api.php?)

source=test&user=6666&pass=1234&function=sounds\_list&format=selectframe&comments=fieldname&stage=date

Example responses:

<success is inferred by output of audio files list>

ERROR: sounds\_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST

ERROR: audio store web directory does not exist: |6666|sounds\_list/srv/www/htdocs/1234|

ERROR: sounds\_list CENTRAL SOUND CONTROL IS NOT ACTIVE

## **moh\_list**

outputs a list of music on hold classes in the system

NOTE: api user for this function must have user\_level set to 7 or higher

**OPTIONAL FIELDS-**

format - format of the output(tab, link, selectframe)

comments - name of the field to populate

Example URL strings for API calls:

[http://server/dialer /non\\_agent\\_api.php?](http://server/dialer /non_agent_api.php?)

source=test&user=6666&pass=1234&function=moh\_list&format=selectframe&comments=fieldname&stage=date

Example responses:

<success is inferred by output of moh classes list>

ERROR: moh\_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST

ERROR: moh\_list CENTRAL SOUND CONTROL IS NOT ACTIVE

## **vm\_list**

outputs a list of voicemail boxes in the system

NOTE: api user for this function must have user\_level set to 7 or higher

**OPTIONAL FIELDS-**

format - format of the output(tab, link, selectframe)  
comments - name of the field to populate

#### Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=vm\_list&format=selectframe&comments=fieldname&stage=date

#### Example responses:

<success is inferred by output of voicemail boxes list>  
ERROR: vm\_list USER DOES NOT HAVE PERMISSION TO VIEW VOICEMAIL BOXES LIST  
ERROR: vm\_list CENTRAL SOUND CONTROL IS NOT ACTIVE

## **blind\_monitor**

calls user-defined phone and places them in session as blind monitor  
NOTE: api user for this function must have user\_level set to 7 or higher

#### **REQUIRED FIELDS-**

phone\_login - alpha-numeric, no spaces or special characters allowed  
session\_id - must be all numbers, 7 digits  
server\_ip - must be all numbers and dots, max 15 characters  
source - description of what originated the API call (maximum 20 characters)  
stage - MONITOR, BARGE(or BARGESWAP) or HIJACK, default is MONITOR  
(HIJACK option is not currently functional)

#### Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=blind\_monitor&phone\_login=350a&session\_id=8600051&server\_ip=10.10.10.16&stage=MONITOR

#### Example responses:

SUCCESS: blind\_monitor HAS BEEN LAUNCHED - 350a|010\*010\*010\*017\*350|8600051  
ERROR: blind\_monitor INVALID PHONE LOGIN - 350q  
ERROR: blind\_monitor INVALID SESSION ID - 8602051  
ERROR: blind\_monitor USER DOES NOT HAVE PERMISSION TO BLIND MONITOR - 6666|0  
ERROR: NO FUNCTION SPECIFIED

## **agent\_ingroup\_info**

shows in-group and outbound auto-dial info for logged-in agent

NOTE: api user for this function must have user\_level set to 7 or higher

#### **REQUIRED FIELDS-**

agent\_user - 2-20 characters  
source - description of what originated the API call (maximum 20 characters)

#### **SETTINGS FIELDS-**

stage - info(show information only), change(show options to change), text(standard non-HTML output)

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&function=agent\_ingroup\_info&stage=change&user=6666&pass=1234&agent\_user=1000

Example responses:

ERROR: agent\_ingroup\_info USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: agent\_ingroup\_info INVALID USER ID - 1255|6666

## agent\_campaigns

looks up allowed campaigns/in-groups for a specific user

NOTE: api user for this function must have user\_level set to 7 or higher

### REQUIRED FIELDS-

agent\_user - 2-20 characters

source - description of what originated the API call (maximum 20 characters)

### OPTIONAL FIELDS-

campaign\_id - 2-8 characters

ignore\_agentdirect - Y or N, default is N. Exclude AGENTDIRECT in-groups from results or not

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?

source=test&function=agent\_campaigns&user=6666&pass=1234&agent\_user=1000 http://server/dialer /non\_agent\_api.php?

source=test&function=agent\_campaigns&campaign\_id=TESTCAMP&ignore\_agentdirect=Y&user=6666&pass=1234&agent\_user=1000&stage=csv

Example responses:

ERROR: agent\_campaigns USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: agent\_campaigns INVALID USER ID - 1255|6666

ERROR: agent\_campaigns AGENT USER DOES NOT EXIST - 1000|6666

ERROR: agent\_campaigns THIS AGENT USER HAS NO AVAILABLE CAMPAIGNS - 1000|6666

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

user|allowed\_campaigns\_list|allowed\_ingroups\_list

1000|TESTCAMP-TEST123-TEST987|TEST\_IN-TEST\_IN2-TEST\_IN3-TEST\_IN4-SALESLINE

## campaigns\_list

displays information about all campaigns in the system

NOTE: api user for this function must have user\_level set to 7 or higher

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)

### OPTIONAL FIELDS-



campaign\_id - 2-8 characters, for all campaigns, leave blank

#### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

#### Example URL strings for API calls: http://server/dialer

/non\_agent\_api.php?source=test&function=campaigns\_list&user=6666&pass=1234 http://server/dialer /non\_agent\_api.php?  
source=test&function=campaigns\_list&campaign\_id=TESTCAMP&user=6666&pass=1234&stage=csv

#### Example responses:

ERROR: campaigns\_list USER DOES NOT HAVE PERMISSION TO GET CAMPAIGN INFO - 6666|0  
ERROR: campaigns\_list THIS USER HAS NO VIEWABLE CAMPAIGNS - 6666

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

campaign\_id|campaign\_name|active|user\_group|dial\_method|dial\_level|lead\_order|dial\_statuses  
TESTCAMP|Test Campaign|Y|---ALL---|INBOUND\_MAN|1|DOWN|PDROP DROP B NEW

## hopper\_list

displays information about leads in the hopper for a campaign

NOTE: api user for this function must have user\_level set to 7 or higher

#### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
campaign\_id - 2-8 characters

#### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

#### OPTIONAL FIELDS-

search\_method - for faster but blocking SQL queries that may affect database performance, set this to BLOCK

#### Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&function=hopper\_list&campaign\_id=TESTCAMP&user=6666&pass=1234&stage=csv

#### Example responses:

ERROR: hopper\_list USER DOES NOT HAVE PERMISSION TO GET CAMPAIGN INFO - 6666|0  
ERROR: hopper\_list THIS CAMPAIGN DOES NOT EXIST - 6666|TESTCAMP  
ERROR: hopper\_list THERE ARE NO LEADS IN THE HOPPER FOR THIS CAMPAIGN - 6666|TESTCAMP

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

hopper\_order,priority,lead\_id,list\_id,phone\_number,phone\_code,state,status,count,gmt\_offset,rank,alt,hopper\_source,vendor\_lead\_code,source\_id,age\_days,last\_call\_time  
0,0,796292,107,9999001095,1,NY,PDROP,7,-4.00,0,,S,1001095,A321,2681,1 YEARS  
1,0,796295,107,9999001098,1,NY,PDROP,2,-4.00,0,,S,1001098,A322,2681,3 YEARS

## recording\_lookup

looks up recordings based upon user and date or lead\_id

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

#### SEARCH FIELDS-

agent\_user - 2-20 characters  
lead\_id - 1-10 digits  
date - date of the calls to pull (must be in YYYY-MM-DD format)  
uniqueid - uniqueid of the call, works best included with another search field  
extension - 3-100 characters, the extension listed in the recording\_log

#### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header  
duration - Y or N, default is N. Includes the duration of the recording in the output(in seconds), before the location

#### NOTES-

There is a hard limit of 100000 results

Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&function=recording_lookup&stage=pipe&user=6666&pass=1234&agent_user=1000&date=2010-12-03`

Example responses:

ERROR: recording\_lookup USER DOES NOT HAVE PERMISSION TO GET RECORDING INFO - 6666|0

ERROR: recording\_lookup INVALID SEARCH PARAMETERS - 6666|1000||2010-12-03|

ERROR: recording\_lookup NO RECORDINGS FOUND - 1255|6666||2010-12-03|

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

start\_time|user|recording\_id|lead\_id|location

2010-12-03 12:00:01|1000|534820|876409|http://server/path/to/recording/20101203\_120000\_1234567890\_1000-all.wav

If 'duration' is enabled, this will be the format used:

start\_time|user|recording\_id|lead\_id|duration|location

2010-12-03 12:00:01|1000|534820|876409|63|http://server/path/to/recording/20101203\_120000\_1234567890\_1000-all.wav

## did\_log\_export

exports all calls inbound to a DID for one day

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

#### REQUIRED FIELDS-

phone\_number - 2-20 characters, the DID that you want to pull logs for  
date - date of the calls to pull (must be in YYYY-MM-DD format)

#### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

#### NOTES-

There is a hard limit of 100000 results

Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&function=did_log_export&stage=pipe&user=6666&pass=1234&phone_number=3125551212&date=2010-12-03`

Example responses:

ERROR: did\_log\_export USER DOES NOT HAVE PERMISSION TO GET DID INFO - 6666|0  
ERROR: did\_log\_export INVALID SEARCH PARAMETERS - 6666|3125551212|2010-12-03  
ERROR: did\_log\_export NO RECORDS FOUND - 1255|3125551212|2010-12-03

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:  
did\_number|call\_date|caller\_id\_number|length\_in\_sec  
3125551212|2010-12-03 12:00:01|7275551212|123

## phone\_number\_log

exports list of calls placed to one of more phone numbers

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

phone\_number - the phone number(s) that you want to pull logs for. allows more than one, separated by commas

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header  
detail - (ALL) calls or only (LAST) call. default is (ALL)  
type - (IN)inbound, (OUT)outbound or (ALL) calls. defaults is (OUT) calls

### NOTES-

There is a hard limit of 100000 results

The 'phone\_number' field is not indexed by default. If you plan to use this function you may want to have your system admin add indexes on that field in the dialer\_log and dialer\_closer\_log tables.

Example URL strings for API calls:

http://server/dialer/non\_agent\_api.php?

source=test&function=phone\_number\_log&stage=pipe&user=6666&pass=1234&phone\_number=3125551212,9998887112

### Example responses:

ERROR: phone\_number\_log USER DOES NOT HAVE PERMISSION TO GET CALL LOG INFO - 6666|0

ERROR: phone\_number\_log NO VALID PHONE NUMBERS DEFINED - 6666|312|2010-12-03

ERROR: phone\_number\_log NO RECORDS FOUND - 1255|3125551212|2010-12-03

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:  
phone\_number|call\_date|list\_id|length\_in\_sec|lead\_status|hangup\_reason|call\_status|source\_id|user  
9998887112|2017-01-06 08:11:01|82106|25|TD|AGENT|SALE|mail098|6666

## agent\_stats\_export

exports agent activity statistics

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
datetime\_start - start date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format)  
datetime\_end - end date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format)

### SETTINGS FIELDS-

agent\_user - 2-20 characters, use only for one agent stats <optional>  
campaign\_id - 2-8 characters, use only for one campaign stats <optional>

stage - the format of the exported data: csv, tab, pipe(default)  
 header - include a header(YES) or not(NO). This is optional, default is not to include a header  
 time\_format - time format('H','HF','M','S') in hours, minutes or seconds: H = 1:23:45, M = 83:45, S = 5023 (default 'HF')  
 \* HF will force hour format even for zero seconds time "0:00:00"  
 group\_by\_campaign - divide and output the agent results grouped by campaign(YES) or not(NO). This is optional, default is 'NO'

**NOTES-**

There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
 source=test&function=agent\_stats\_export&time\_format=M&stage=pipe&user=6666&pass=1234&agent\_user=6666&datetime\_start=2012-08-09+00:00:00&datetime\_end=2012-08-10+23:59:59  
 http://server/dialer /non\_agent\_apiX.php?  
 DB=0&stage=pipe&user=6666&pass=1234&source=test&function=agent\_stats\_export&datetime\_start=2012-03-26+00:00:00&datetime\_end=2012-03-26+23:59:59&header=YES

Example responses:

ERROR: agent\_stats\_export USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0  
 ERROR: agent\_stats\_export INVALID SEARCH PARAMETERS - 6666||2010-12-03 00:00:00|2010-12-03 00:00:01  
 ERROR: agent\_stats\_export NO RECORDS FOUND - 1255||2010-12-03 00:00:00|2010-12-03 00:00:01

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

```
user|full_name|user_group|calls|login_time|total_talk_time|avg_talk_time|avg_wait_time|pct_of_queue|pause_time|sessions|
avg_session|pauses|avg_pause_time|pause_pct|pauses_per_session|wait_time|talk_time|dispo_time|dead_time
1029|test agent|ADMIN|1|0:01:52|0:00:16|0:00:16|0:00:18|16.7%|54|3|0:00:37|5|0:00:11|48.2%|2|0:00:32|0:07:54|0:01:22|
0:00:00
6666|Admin user|ADMIN|16|0:34:31|0:07:54|0:00:00|0:00:07|100%|1411|13|0:02:39|42|0:00:34|68.1%|3|0:01:44|0:07:54|
0:01:22|0:00:00
```

\* if the 'group\_by\_campaign' option is enabled, the format above will have 'campaign\_id' as the first column, and each agent's activity will be divided on separate lines by the campaigns they were logged into during the requested time period.

**user\_group\_status**

real-time status of one or more user groups

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

**REQUIRED FIELDS-**

source - description of what originated the API call (maximum 20 characters)  
 user\_groups - pipe-delimited list of user groups to get status information for "ADMIN|AGENTS"

**SETTINGS FIELDS-**

stage - the format of the exported data: csv, tab, pipe(default)  
 header - include a header(YES) or not(NO). This is optional, default is not to include a header

**NOTES-**

There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=user\_group\_status&user\_groups=ADMIN|AGENT&header=YES

Example responses:

ERROR: user\_group\_status USER DOES NOT HAVE PERMISSION TO GET USER GROUP INFO - 6666|0

ERROR: user\_group\_status INVALID SEARCH PARAMETERS - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

usergroups|calls\_waiting|agents\_logged\_in|agents\_in\_calls|agents\_waiting|agents\_paused|agents\_in\_dead\_calls|

agents\_in\_dispo

ADMIN AGENT|0|1|0|1|0|0|0|0

## in\_group\_status

real-time status of one or more in groups

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)

in\_groups - pipe-delimited list of inbound groups to get status information for "SALESLINE|SUPPORT"

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

### NOTES-

There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&stage=csv&function=in_group_status&in_groups=SALESLINE|SUPPORT&header=YES)

[source=test&user=6666&pass=1234&stage=csv&function=in\\_group\\_status&in\\_groups=SALESLINE|](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&stage=csv&function=in_group_status&in_groups=SALESLINE|SUPPORT&header=YES)

[SUPPORT&header=YES](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&stage=csv&function=in_group_status&in_groups=SALESLINE|SUPPORT&header=YES)

Example responses:

ERROR: in\_group\_status USER DOES NOT HAVE PERMISSION TO GET IN-GROUP INFO - 6666|0

ERROR: in\_group\_status INVALID SEARCH PARAMETERS - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

ingroups,total\_calls,calls\_waiting,agents\_logged\_in,agents\_in\_calls,agents\_waiting,agents\_paused,agents\_in\_dispo

SALESLINE SUPPORT,31,0,75,54,0,20,1,0

## agent\_status

real-time status of one agent user

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)

agent\_user - 2-20 characters, use only for one agent status

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header  
include\_ip - include computer\_ip field(YES) or not(NO), the last ip address that the agent used to log in to the  
agent screen

Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&user=6666&pass=1234&function=agent_status&agent_user=1234&stage=csv&header=YES&include_ip=YES`

Example responses:

ERROR: agent\_status USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: agent\_status INVALID SEARCH PARAMETERS - 6666||

ERROR: agent\_status AGENT NOT FOUND - 6666||

ERROR: agent\_status AGENT NOT LOGGED IN - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

status,call\_id,lead\_id,campaign\_id,calls\_today,full\_name,user\_group,user\_level,pause\_code,real\_time\_sub\_status,phone\_number,vendor\_lead\_code,session\_id,computer\_ip

INCALL,M4050908070000012345,12345,TESTCAMP,1,Test

Agent,AGENTS,3,LOGIN,,7275551212,123456,8600051,192.168.1.205

INCALL|M418160642000000104|104|TESTBLND|1|Admin|ADMIN|9|BRK2|DEAD|3125551212|123457|8600051|192.168.1.206

PAUSED||105|TESTBLND|1|Admin|ADMIN|9|PREVIEW|9545551212|123458|8600052|192.168.1.202

NOTE: real\_time\_sub\_status field can consist of: DEAD, DISPO, 3-WAY, PARK, RING, PREVIEW, DIAL or it can be empty

## callid\_info

information about a call based upon the caller\_code or call ID

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)

call\_id - 16-40 characters

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

detail - if set to YES, more call info will be output. Default is NO, only callid and customer talk time will be output

Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&user=6666&pass=1234&function=callid_info&call_id=M4050908070000012345&stage=csv&header=YES`

Example responses:

ERROR: callid\_info USER DOES NOT HAVE PERMISSION TO GET CALL INFO - 6666|0

ERROR: callid\_info INVALID SEARCH PARAMETERS - 6666||

ERROR: callid\_info CALL NOT FOUND - 6666||

ERROR: callid\_info CALL LOG NOT FOUND - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

call\_id,custtime

M4050908070000012345,725

Setting "detail=YES" will result in the following output:

call\_id,custtime,call\_date,campaign\_id,list\_id,status,user,phone

M4050908070000012345,725,2014-01-24 09:26:09,TESTCAMP,999,A,6666,3125551212

## lead\_field\_info

pulls the value of one field of a lead

NOTE: api user for this function must have user\_level set to 7 or higher and "modify leads" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
lead\_id - 1-10 characters  
field\_name - name of lead field to pull

### OPTIONAL FIELDS-

custom\_fields - Y or N, default is N. If the field you want to pull is a custom field or not  
list\_id - override for the entry\_list\_id of a custom field

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_field_info&field_name=cc_value&lead_id=1139739&custom_fields=Y&list_id=999888999777)

source=test&user=6666&pass=1234&function=lead\_field\_info&field\_name=cc\_value&lead\_id=1139739&custom\_fields=Y&list\_id=999888999777

### Example responses:

ERROR: lead\_field\_info USER DOES NOT HAVE PERMISSION TO GET LEAD INFO - 6666|0

ERROR: lead\_field\_info INVALID SEARCH PARAMETERS - 6666||

ERROR: lead\_field\_info LIST NOT FOUND - 6666||

ERROR: lead\_field\_info LEAD NOT FOUND - 6666||

ERROR: lead\_field\_info LEAD FIELD NOT FOUND - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the value of the field:  
1234567890

## lead\_all\_info

outputs all lead data for a lead(optionally including custom fields)

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled and modify\_leads set to 1-5

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
lead\_id - 1-10 digits

### OPTIONAL FIELDS-

phone\_number - 6-19 digits, can be used in place of a lead\_id(may return multiple records, up to 1000, most recently added lead first)

custom\_fields - Y or N, default is N. If the field you want to pull is a custom field or not

force\_entry\_list\_id - 3-12 digits, will override the lead's assigned entry\_list\_id to look for custom fields data for this lead from a different list

## SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, newline, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

### Example URL strings for API calls: <http://server/dialer>

[/non\\_agent\\_api.php?source=test&user=6666&pass=1234&function=lead\\_all\\_info&lead\\_id=1079425](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_all_info&lead_id=1079425) [http://server/dialer/non\\_agent\\_api.php?source=test&user=6666&pass=1234&function=lead\\_all\\_info&phone\\_number=3125551212](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_all_info&phone_number=3125551212)  
[http://server/dialer/non\\_agent\\_api.php?source=test&user=6666&pass=1234&function=lead\\_all\\_info&lead\\_id=1079425&header=YES&custom\\_fields=Y](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_all_info&lead_id=1079425&header=YES&custom_fields=Y)  
[http://server/dialer/non\\_agent\\_api.php?source=test&user=6666&pass=1234&function=lead\\_all\\_info&lead\\_id=1079425&header=YES&custom\\_fields=Y&force\\_entry\\_list\\_id=999880](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_all_info&lead_id=1079425&header=YES&custom_fields=Y&force_entry_list_id=999880)

### Example responses:

ERROR: lead\_all\_info USER DOES NOT HAVE PERMISSION TO GET LEAD INFO - 6666|0  
ERROR: lead\_all\_info LIST NOT FOUND - 6666||  
ERROR: lead\_all\_info LEAD NOT FOUND - 6666|||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:  
status|user|vendor\_lead\_code|source\_id|list\_id|gmt\_offset\_now|phone\_code|phone\_number|title|first\_name|middle\_initial|last\_name|address1|address2|address3|city|state|province|postal\_code|country\_code|gender|date\_of\_birth|alt\_phone|email|security\_phrase|comments|called\_count|last\_local\_call\_time|rank|owner|entry\_list\_id  
TD|6666|554443||501|-4.00|1|9998887112|Mr|Billy|Oj|U|O'Reillyo|ad1|ad2|ad3|city next|FL|U|33777||U|0000-00-00|bobo'brien|test@test.com||2017-06-01 18:38:41|79|2017-06-09 14:53:27|0|4646|0|98234789

## lead\_status\_search

displays all field values of all leads that match the status and call date in request

NOTE: api user for this function must have user\_level set to 7 or higher and "modify leads" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
status - status of leads to be pulled  
date - called date of the leads to pull (must be in YYYY-MM-DD format)  
NOTE: both inbound and outbound call logs are searched, no more than 2000 responses are displayed

### OPTIONAL FIELDS-

lead\_id - 1-10 digits, only used if status and date are empty  
custom\_fields - Y or N, default is N. Display custom fields values or not  
list\_id - override for the entry\_list\_id of a custom field

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?source=test&user=6666&pass=1234&function=lead\\_status\\_search&status=NP&date=2017-12-29&custom\\_fields=Y](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_status_search&status=NP&date=2017-12-29&custom_fields=Y)

### Example responses:

ERROR: lead\_status\_search USER DOES NOT HAVE PERMISSION TO GET LEAD INFO - 6666|0  
ERROR: lead\_status\_search INVALID SEARCH PARAMETERS - 6666||  
ERROR: lead\_status\_search NO RESULTS FOUND - 6666|||

A SUCCESS response will not show "SUCCESS", but instead will print the values of all lead fields, one per line, with leads beginning with ";----- START OF RECORD 1----- ":



```
;----- START OF RECORD 1 -----  
lead_id => 823602  
status => TD  
user => 6666  
vendor_lead_code => 1028405  
source_id => I  
list_id => 107  
gmt_offset_now => -5.00  
phone_code => 1  
phone_number => 9999028405  
...  
test_custom_field => new value
```

## lead\_search

searches for leads in the dialer \_list table by phone numbers

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled and modify\_leads set to 1-5

### REQUIRED FIELDS-

phone\_number - 6-19 digits(multiple separated by a comma ',', for example:  
3125551212,9055551212,4075551212)  
source - description of what originated the API call (maximum 20 characters)

### SETTINGS FIELDS-

records - number of records to display in results if more than 1 found (defaults to '1000'[most recently inserted leads displayed first])

### SETTINGS FIELDS-

header - include a header(YES) or not(NO). This is optional, default is not to include a header

### NOTES-

- If no results are found for any of the searched phone numbers, then an error will be displayed
- If there are any matches found, every phone number searched for will have one line in the output, detailed below
- If more than 1 matching lead is found for a phone number, then the matching lead\_ids will be separated by a dash '-'

Example URL strings for API calls:

```
http://server/dialer /non_agent_api.php?
```

```
source=test&user=6666&pass=1234&function=lead_search&phone_number=9998885112,9998887112,9998886112,4075551212
```

```
http://server/dialer /non_agent_api.php?
```

```
source=test&user=6666&pass=1234&function=lead_search&phone_number=9998885112,9055551212,9998886112,4075551212&header=YES
```

Example responses:

```
ERROR: lead_search USER DOES NOT HAVE PERMISSION TO SEARCH FOR LEADS - 6666|0
```

```
ERROR: lead_search NO VALID SEARCH METHOD - ||||
```

```
ERROR: lead_search NO MATCHES FOUND IN THE SYSTEM - ||||
```

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

```
search_key|records_found|lead_ids
```

```
9998885112|4|1949076-1946517-1943958-1941399
```

```
9998887112|8|1946941-1946940-1946939-1946875-1946805-1946656-1946655-1944382
```

```
9998886112|1|1946891
```

4075551212|0|

## ccc\_lead\_info

outputs lead data for cross-cluster-communication call

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
call\_id - 16-40 characters

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, newline, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

### Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=ccc_lead_info&call_id=M4050908070000012345&stage=csv&header=YES)

[source=test&user=6666&pass=1234&function=ccc\\_lead\\_info&call\\_id=M4050908070000012345&stage=csv&header=YES](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=ccc_lead_info&call_id=M4050908070000012345&stage=csv&header=YES)

### Example responses:

ERROR: ccc\_lead\_info USER DOES NOT HAVE PERMISSION TO GET LEAD INFO - 6666|0

ERROR: ccc\_lead\_info INVALID SEARCH PARAMETERS - 6666||

ERROR: ccc\_lead\_info CALL NOT FOUND - 6666||

ERROR: ccc\_lead\_info LEAD NOT FOUND - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:  
status|user|vendor\_lead\_code|source\_id|list\_id|gmt\_offset\_now|phone\_code|phone\_number|title|first\_name|middle\_initial|last\_name|address1|address2|address3|city|state|province|postal\_code|country\_code|gender|date\_of\_birth|alt\_phone|email|security\_phrase|comments|called\_count|last\_local\_call\_time|rank|owner  
TD|6666|554443||501|-4.00|1|9998887112|Mr|Billy'Oj|U|O'Reillyo|ad1|ad2|ad3|city next|FL|U|33777||U|0000-00-00|bobo'brien|test@test.com||2017-06-01 18:38:41|79|2017-06-09 14:53:27|0|4646

## lead\_callback\_info

outputs scheduled callback data for a specific lead

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
lead\_id - 16-40 characters

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, newline, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header  
search\_location - Where to check for scheduled callback records in the system, can select only one(default is CURRENT):  
CURRENT - check for active scheduled callbacks  
ARCHIVE - check for archived scheduled callbacks  
ALL - check for both active and archived scheduled callbacks

### Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=lead_callback_info&lead_id=M4050908070000012345&stage=csv&header=YES)

source=test&user=6666&pass=1234&function=lead\_callback\_info&lead\_id=12345&stage=pipe&header=YES&search\_location=ALL  
http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=lead\_callback\_info&lead\_id=846446&search\_location=ALL&header=YES

#### Example responses:

ERROR: lead\_callback\_info USER DOES NOT HAVE PERMISSION TO GET LEAD INFO - 6666|0  
ERROR: lead\_callback\_info INVALID SEARCH PARAMETERS - 6666||  
ERROR: lead\_callback\_info LEAD NOT FOUND - 6666||  
ERROR: lead\_callback\_info CALLBACK NOT FOUND - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format(The most recent callback entry will be at the bottom of the results):

lead\_id|callback\_type|recipient|callback\_status|lead\_status|callback\_date|entry\_date|user|list\_id|campaign\_id|user\_group|customer\_timezone|customer\_time|comments  
846446|ARCHIVE|USERONLY|INACTIVE|CBTEST|2018-09-01 15:00:00|2018-08-27 01:06:45|6666|107|TESTCAMP|ADMIN|AUS-ACST-N-Northern Territory Time Zone|2018-08-27 00:00:00|  
846446|ARCHIVE|USERONLY|INACTIVE|CBTEST|2018-12-14 14:00:00|2018-12-14 16:42:32|6666|107|TESTCAMP|ADMIN||2018-12-14 14:00:00|Call back after lunch  
846446|CURRENT|USERONLY|INACTIVE|CBTEST|2018-12-14 19:00:00|2018-12-14 16:44:08|6666|107|TESTCAMP|ADMIN||2018-12-14 19:00:00|Call back after dinner  
846446|CURRENT|USERONLY|ACTIVE|CBLEAD|2018-12-17 10:00:00|2018-12-14 16:50:56|6666|107|TESTCAMP|ADMIN|USA-EST-Y-Eastern US Time Zone|2018-12-17 10:00:00|try back Monday morning

## update\_log\_entry

updates the status of a dialer\_log or dialer\_closer\_log entry

NOTE: api user for this function must have user\_level set to 8 or higher and "modify leads" enabled

#### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
call\_id - either the uniqueid or the 20-character ID of the call  
group - either a campaign\_id or an in-group group\_id  
status - the new status for the log record to be set to

#### NOTES-

There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_log\_entry&group=SALESLINE&call\_id=Y2010309520000000234  
&status=SALEX

Example responses:

ERROR: update\_log\_entry USER DOES NOT HAVE PERMISSION TO UPDATE LOGS - 6666|0  
ERROR: update\_log\_entry INVALID SEARCH PARAMETERS - 6666||  
ERROR: update\_log\_entry GROUP NOT FOUND - 6666||  
ERROR: update\_log\_entry NO RECORDS FOUND - 6666|||  
ERROR: update\_log\_entry NO RECORDS UPDATED - 6666|TESTCAMP|M9131554060000426264|SALEX|SALEX|1347566056.399  
SUCCESS: update\_log\_entry RECORD HAS BEEN UPDATED - 6666|6666|TESTCAMP|M9131554060000426264|SALEX|WN|1347566056.399|

## add\_lead

adds a new lead to the dialer \_list table with several fields and options

NOTE: api user for this function must have modify\_leads set to 1 and user\_level must be set to 8 or higher

### REQUIRED FIELDS-

phone\_number - must be all numbers, 6-16 digits  
phone\_code - must be all numbers, 1-4 digits, defaults to 1 if not set  
list\_id - must be all numbers, 3-12 digits, defaults to 999 if not set  
source - description of what originated the API call (maximum 20 characters)

### SETTINGS FIELDS-

dnc\_check - Y, N or AREACODE, default is N  
campaign\_dnc\_check - Y, N or AREACODE, default is N  
campaign\_id - 2-8 Character campaign ID, required if using campaign\_dnc\_check or callbacks  
add\_to\_hopper - Y or N, default is N  
hopper\_priority - 99 to -99, the higher number the higher priority, default is 0  
hopper\_local\_call\_time\_check - Y or N, default is N. Validate the local call time and/or state call time before inserting lead in the hopper  
duplicate\_check - Check for duplicate records in the system, can select more than one (duplicate\_check=DUPLIST-DUPTITLEALTPHONELIST)

If duplicate is found, will return error, the duplicate data and lead\_id and list\_id of existing record

Here are the duplicate\_check options:

DUPLIST - check for duplicate phone\_number in same list  
DUPCAMP - check for duplicate phone\_number in all lists for this list's campaign  
DUPSYS - check for duplicate phone\_number in entire system  
DUPTITLEALTPHONELIST - check for duplicate title and alt\_phone in same list  
DUPTITLEALTPHONECAMP - check for duplicate title and alt\_phone in all lists for this list's campaign  
DUPTITLEALTPHONESYS - check for duplicate title and alt\_phone in entire system  
DUPNAMEPHONELIST - check for duplicate first\_name, last\_name and phone\_number in same list  
DUPNAMEPHONECAMP - check for duplicate first\_name, last\_name and phone\_number in all lists for

this list's campaign

DUPNAMEPHONESYS - check for duplicate first\_name, last\_name and phone\_number in entire system  
" 1/2/3/7/14/15/21/28/30/60/90/180/360DAY - Added to one of the above duplicate checks(i.e.

"DUPSYS90DAY"), only checks leads loaded in last 90 days

usacan\_prefix\_check - Y or N, default is N. Check for a valid 4th digit for USA and Canada phone numbers (cannot be 0 or 1)

usacan\_areacode\_check - Y or N, default is N. Check for a valid areacode for USA and Canada phone numbers(also checks for 10-digit length)

nanpa\_ac\_prefix\_check - Y or N, default is N. Check for a valid NANPA areacode and prefix, if optional NANPA data is on the system

custom\_fields - Y or N, default is N. Defines whether the API will accept custom field data when inserting leads into the dialer \_list table

For custom fields to be inserted, just add the field label as a variable to the URL string

For example, if the field\_label is "favorite\_color" you would add "&favorite\_color=blue"

tz\_method - <empty>, POSTAL, TZCODE or NANPA, default is <empty> which will use the country code and areacode for time zone lookups

POSTAL relies on the postal\_code field

TZCODE relies on the owner field being populated with a proper time zone code

NANPA relies on the optional NANPA areacode prefix data being loaded on your

system

callback - Y or N, default is N. Set this lead as a scheduled callback. campaign\_id field is REQUIRED for callbacks

callback\_status - 1-6 Character, callback status to use, default is CALLBK (dialer \_list status will be set to CBHOLD to lock)

callback\_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED if callback is set.

'NOW' can be used for current datetime. 'xDAYS' can also be used where 'x' is replaced with a number of

days in the future  
 callback\_type - USERONLY or ANYONE, default is ANYONE  
 callback\_user - User ID the USERONLY callback is assigned to  
 callback\_comments - Optional comments to appear when the callback is called back  
 lookup\_state - Y or N, default is N. Looks up state field from areacode list. Only works if the 'state' field is not populated.  
 list\_exists\_check - Y or N, default is N. If the list\_id is not a defined list in the system, it will ERROR and not insert the lead.

(for fields with spaces in the values, you can replace the space with a plus + sign[address, city, first\_name, etc...])

**OPTIONAL FIELDS-**

vendor\_lead\_code - 1-20 characters  
 source\_id - 1-50 characters  
 gmt\_offset\_now - overridden by auto-lookup of phone\_code and area\_code portion of phone number if applicable  
 title - 1-4 characters  
 first\_name - 1-30 characters  
 middle\_initial - 1 character  
 last\_name - 1-30 characters  
 address1 - 1-100 characters  
 address2 - 1-100 characters  
 address3 - 1-100 characters  
 city - 1-50 characters  
 state - 2 characters  
 province - 1-50 characters  
 postal\_code - 1-10 characters  
 country\_code - 3 characters  
 gender - U, M, F (Undefined, Male, Female) - defaults to 'U'  
 date\_of\_birth - YYYY-MM-DD  
 alt\_phone - 1-12 characters  
 email - 1-70 characters  
 security\_phrase - 1-100 characters  
 comments - 1-255 characters  
 multi\_alt\_phones - 5-1024 characters (see examples for more info)  
 rank - 1-5 digits  
 owner - 1-20 characters (user ID, Territory or user group)  
 entry\_list\_id - WARNING! ONLY USE IF YOU KNOW WHAT YOU ARE DOING, CAN BREAK CUSTOM FIELDS! (must be all numbers, 3-12 digits, will not work if custom\_fields is set to Y)

Multi-ALT-Phones format:

7275551212\_1\_work!7275551213\_1\_sister+house!1234567890\_1\_neighbor

The multi-alt-phones field is formatted as a field of phone-number/phone-code/phone-note set of data(phone code and alt\_note are both optional and the phone code can be overridden by the force phone code flag). The record delimiter is an exclamation point with the optional phone code and note delimited within the record by an underscore character \_.

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111)

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551111

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551212&phone_code=1&list_id=999&dnc_check=N&first_name=Bob&last_name=Wilson)

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551212&phone\_code=1&list\_id=999&dnc\_check=N&first\_name=Bob&last\_name=Wilson

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111&phone_code=1&list_id=999&dnc)

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551111&phone\_code=1&list\_id=999&dnc

\_check=N&first\_name=Bob&last\_name=Wilson&add\_to\_hopper=Y&hopper\_local\_call\_time\_check=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551111&phone\_code=1&list\_id=999&dnc\_check=N&campaign\_dnc\_check=Y&campaign\_id=TESTCAMP&first\_name=Bob&last\_name=Wilson&address1=1234+Main+St.&city=Chicago+Heights&state=IL&add\_to\_hopper=Y&hopper\_local\_call\_time\_check=Y&multi\_alt\_phones=7275551212\_1\_work!7275551213\_1\_sister+house!1234567890\_1\_neighbor

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551212&phone\_code=1&list\_id=999&dnc\_check=N&first\_name=Bob&last\_name=Wilson&duplicate\_check=DUPLIST-DUPNAMEPHONELIST

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551212&phone\_code=1&list\_id=999&custom\_fields=Y&favorite\_color=blue

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=add\_lead&phone\_number=7275551111&campaign\_id=TESTCAMP&callback=Y&callback\_status=CALLBK&callback\_datetime=NOW&callback\_type=USERONLY&callback\_user=6666&callback\_comments=Comments+go+here

Example responses: (The "data" values for a successful add\_lead request are: phone\_number, list\_id, lead\_id, gmt\_offset\_now)

SUCCESS: add\_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193715|-4

NOTICE: add\_lead ADDED TO HOPPER - 7275551111|6666|193715|1677922

SUCCESS: add\_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4

NOTICE: add\_lead CUSTOM FIELDS VALUES ADDED - 7275551111|1234|101

NOTICE: add\_lead CUSTOM FIELDS NOT ADDED, CUSTOM FIELDS DISABLED - 7275551111|Y|0

NOTICE: add\_lead CUSTOM FIELDS NOT ADDED, NO CUSTOM FIELDS DEFINED FOR THIS LIST - 7275551111|1234|101

NOTICE: add\_lead CUSTOM FIELDS NOT ADDED, NO FIELDS DEFINED - 7275551111|1234|101

NOTICE: add\_lead MULTI-ALT-PHONE NUMBERS LOADED - 3|6666|193716

NOTICE: add\_lead NOT ADDED TO HOPPER, OUTSIDE OF LOCAL TIME - 7275551111|6666|193716|-4|0

NOTICE: add\_lead SCHEDULED CALLBACK ADDED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|USERONLY|CALLBK

NOTICE: add\_lead SCHEDULED CALLBACK NOT ADDED, USER NOT VALID - 1234|TESTCAMP|6

NOTICE: add\_lead SCHEDULED CALLBACK NOT ADDED, CAMPAIGN NOT VALID - 1234|XYZ

NOTICE: add\_lead NANPA options disabled, NANPA prefix data not loaded - 0|6666

ERROR: add\_lead INVALID PHONE NUMBER LENGTH - 72755|6666

ERROR: add\_lead INVALID PHONE NUMBER PREFIX - 72755|6666

ERROR: add\_lead INVALID PHONE NUMBER AREACODE - 72755|6666

ERROR: add\_lead INVALID PHONE NUMBER NANPA AREACODE PREFIX - 7275551212|6666

ERROR: add\_lead USER DOES NOT HAVE PERMISSION TO ADD LEADS TO THE SYSTEM - 6666|0

ERROR: add\_lead NOT AN ALLOWED LIST ID - 7275551212|98762

ERROR: add\_lead NOT A DEFINED LIST ID, LIST EXISTS CHECK ENABLED - 7275551212|12344

ERROR: NO FUNCTION SPECIFIED

ERROR: add\_lead DUPLICATE PHONE NUMBER IN LIST - 7275551111|101|8765444

ERROR: add\_lead DUPLICATE PHONE NUMBER IN CAMPAIGN LISTS - 7275551111|101|8765444|101

ERROR: add\_lead DUPLICATE PHONE NUMBER IN SYSTEM - 7275551111|101|8765444|101

ERROR: add\_lead DUPLICATE TITLE ALT\_PHONE IN LIST - 1234|7275551111|101|8765444

ERROR: add\_lead DUPLICATE TITLE ALT\_PHONE IN CAMPAIGN LISTS - 1234|7275551111|101|8765444|101

ERROR: add\_lead DUPLICATE TITLE ALT\_PHONE IN SYSTEM - 1234|7275551111|101|8765444|101  
ERROR: add\_lead DUPLICATE NAME PHONE IN LIST - Bob|Smith|7275551113|101|8765444|101  
ERROR: add\_lead DUPLICATE NAME PHONE IN CAMPAIGN LISTS - Bob|Smith|7275551113|101|8765444|101  
ERROR: add\_lead DUPLICATE NAME PHONE IN SYSTEM - Bob|Smith|7275551113|101|8765444|101

## update\_lead

updates lead information in the dialer\_list and custom\_tables

NOTE: api user for this function must have modify\_leads set to 1 and user\_level must be set to 8 or higher

### REQUIRED FIELDS-

lead\_id - must be all numbers, 1-9 digits, not required if using vendor\_lead\_code or phone\_number  
vendor\_lead\_code - can be used instead of lead\_id to match leads  
phone\_number - can be used instead of lead\_id or vendor\_lead\_code to match leads  
source - description of what originated the API call (maximum 20 characters)

### SETTINGS FIELDS-

search\_method - You can combine the following 3 options in this field to search the parameters you desire:  
LEAD\_ID, will attempt to find a match with the lead\_id  
VENDOR\_LEAD\_CODE, will attempt to find a match with the vendor\_lead\_code  
PHONE\_NUMBER, will attempt to find a match with the phone\_number

For example to search lead\_id and vendor\_lead\_code:

"&search\_method=LEAD\_ID\_VENDOR\_LEAD\_CODE"

The search order is NOT preserved, Lead ID is always first, Vendor Lead Code is second and Phone number is last. Default is "LEAD\_ID"

search\_location - Where to check for records in the system, can select only one(default is SYSTEM):

LIST - check for lead in same list  
CAMPAIGN - check for lead in all lists for this list's campaign  
SYSTEM - check for lead in entire system

If no list\_id is defined, the search\_location will be assumed as SYSTEM

insert\_if\_not\_found - Y or N, will attempt to insert as a NEW lead if no match is found, default is N.

Insertion will require phone\_code, phone\_number and list\_id. lead\_id will be ignored.

Most of the add\_lead options that are not available if you use this setting in this function

records - number of records to update if more than 1 found (defaults to '1'[most recently loaded lead])

custom\_fields - Y or N, default is N. Defines whether the API will accept custom field data when updating leads in the dialer\_list table

For custom fields to be updated, just add the field label as a variable to the URL string

For example, if the field\_label is "favorite\_color" you would add "&favorite\_color=blue"

no\_update - Y or N, Setting this to Y will not perform any updates, but will instead only tell you if a lead exists that matches the search criteria, default is N.

delete\_lead - Y or N, Setting this to Y will delete the lead from the dialer\_list table, default is N.

delete\_cf\_data - Y or N, Setting this to Y will delete the custom fields data for this lead and reset the entry\_list\_id, default is N.

reset\_lead - Y or N, Setting this to Y will reset the called-since-last-reset flag of the lead, default is N.

callback - Y, N or REMOVE, default is N. Set this lead as a scheduled callback. REMOVE will delete the scheduled callback entry

callback\_status - 1-6 Character, callback status to use, default is CALLBK (dialer\_list status will be set to CBHOLD to lock)

callback\_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED if callback is set. 'NOW' can be used for current datetime. 'xDAYS' can also be used where 'x' is replaced with a number of days in the future

callback\_type - USERONLY or ANYONE, default is ANYONE

callback\_user - User ID the USERONLY callback is assigned to



callback\_comments - Optional comments to appear when the callback is called back  
 update\_phone\_number - Y or N, Optional setting to update the phone\_number field, default is N.  
 add\_to\_hopper - Y or N, default is N  
 remove\_from\_hopper - Y or N, default is N  
 hopper\_priority - 99 to -99, the higher number the higher priority, default is 0  
 hopper\_local\_call\_time\_check - Y or N, default is N. Validate the local call time and/or state call time before inserting lead in the hopper  
 list\_exists\_check - Y or N, default is N. If the list\_id\_field is not a defined list in the system, it will ERROR and not update the lead.

**EDITABLE FIELDS-**

user\_field - 1-20 characters, this updates the 'user' field in the dialer\_list table  
 list\_id\_field - 3-12 digits, this updates the 'list\_id' field in the dialer\_list table  
 status - 1-6 characters, not punctuation or spaces  
 vendor\_lead\_code - 1-20 characters  
 source\_id - 1-50 characters  
 gmt\_offset\_now - overridden by auto-lookup of phone\_code and area\_code portion of phone number if applicable  
 title - 1-4 characters  
 first\_name - 1-30 characters  
 middle\_initial - 1 character  
 last\_name - 1-30 characters  
 address1 - 1-100 characters  
 address2 - 1-100 characters  
 address3 - 1-100 characters  
 city - 1-50 characters  
 state - 2 characters  
 province - 1-50 characters  
 postal\_code - 1-10 characters  
 country\_code - 3 characters  
 gender - U, M, F (Undefined, Male, Female) - defaults to 'U'  
 date\_of\_birth - YYYY-MM-DD  
 alt\_phone - 1-12 characters  
 email - 1-70 characters  
 security\_phrase - 1-100 characters  
 comments - 1-255 characters  
 rank - 1-5 digits  
 owner - 1-20 characters (user ID, Territory or user group)  
 called\_count - digits only, the number of attempts dialing the lead  
 phone\_code - digits only, can be 1-4 digits  
 entry\_list\_id - WARNING! ONLY USE IF YOU KNOW WHAT YOU ARE DOING, CAN BREAK  
 CUSTOM FIELDS! (must be all numbers, 3-12 digits, will not work if custom\_fields is set to Y)  
 force\_entry\_list\_id - WARNING! ONLY USE IF YOU KNOW WHAT YOU ARE DOING, CAN BREAK  
 CUSTOM FIELDS! (must be all numbers, 3-12 digits, will override entry\_list\_id to this value in all custom fields queries executed by this command)

**NOTES:**

- in order to set a field to empty("") set it equal to --BLANK--, i.e. "&province=--BLANK--"
- please use no special characters like apostrophes, double-quotes or ampersands

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=27&last_name=SMITH)

[source=test&user=6666&pass=1234&function=update\\_lead&lead\\_id=27&last\\_name=SMITH](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=VENDOR_LEAD_CODE&vendor_lead_code=1000019&last_name=JOHNSON)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&records=2&list_id=810)

[source=test&user=6666&pass=1234&function=update\\_lead&search\\_method=VENDOR\\_LEAD\\_CODE&vendor\\_lead\\_code=1000019&last\\_name=JOHNSON](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&records=2&list_id=810)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&records=2&list_id=810)

[source=test&user=6666&pass=1234&function=update\\_lead&search\\_method=PHONE\\_NUMBER&records=2&list\\_id=810](http://server/dialer/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&records=2&list_id=810)

7&search\_location=LIST&phone\_number=9999000019&last\_name=WILSON

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=405794&last\_name=SMITH&city=Chicago&custom\_fields=Y&favorite\_color=blue

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&search\_location=LIST&search\_method=PHONE\_NUMBER &insert\_if\_not\_found=Y&phone\_number=9999000029&phone\_code=1&list\_id=999&first\_name=Bob&last\_name=Wilson&city=Chicago&custom\_fields=Y&favorite\_color=red

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&insert\_if\_not\_found=Y&search\_method=VENDOR\_LEAD\_CODE\_PHONE\_NUMBER&vendor\_lead\_code=89763545&phone\_number=7275551212&phone\_code=1&list\_id=999&first\_name=Bob&last\_name=Wilson&custom\_fields=Y&favorite\_color=blue

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&search\_location=LIST&search\_method=VENDOR\_LEAD\_CODE\_PHONE\_NUMBER&insert\_if\_not\_found=Y&phone\_number=9999000029&phone\_code=1&list\_id=999&first\_name=Bob&last\_name=Wilson&city=Chicago&custom\_fields=Y&favorite\_color=red&user\_field=1008&list\_id\_field=107&status=OLD

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=27&no\_update=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=27&delete\_lead=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=27&delete\_cf\_data=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=27&delete\_lead=Y&custom\_fields=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&lead\_id=406757&campaign\_id=TESTCAMP&callback=Y&callback\_status=CALLBK&callback\_datetime=NOW&callback\_type=USERONLY&callback\_user=1028&callback\_comments=Comments+go+here+again

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_lead&search\_location=SYSTEM&search\_method=PHONE\_NUMBER&phone\_number=9998887112&no\_update=Y&add\_to\_hopper=Y&hopper\_priority=99&hopper\_local\_call\_time\_check=Y

Example responses:

SUCCESS: update\_lead LEAD HAS BEEN UPDATED - 6666|193716

NOTICE: update\_lead CUSTOM FIELDS VALUES UPDATED - 7275551111|1234|101

NOTICE: update\_lead CUSTOM FIELDS NOT UPDATED, CUSTOM FIELDS DISABLED - 7275551111|Y|0

NOTICE: update\_lead CUSTOM FIELDS NOT UPDATED, NO CUSTOM FIELDS DEFINED FOR THIS LIST -

7275551111|1234|101

NOTICE: update\_lead CUSTOM FIELDS NOT UPDATED, NO FIELDS DEFINED - 7275551111|1234|101

NOTICE: update\_lead SCHEDULED CALLBACK UPDATED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|

USERONLY|CALLBK

NOTICE: update\_lead SCHEDULED CALLBACK NOT UPDATED, NO FIELDS SPECIFIED - 1234|

NOTICE: update\_lead SCHEDULED CALLBACK ADDED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|USERONLY|

CALLBK

NOTICE: update\_lead SCHEDULED CALLBACK NOT ADDED, USER NOT VALID - 1234|TESTCAMP|6|

NOTICE: update\_lead SCHEDULED CALLBACK NOT ADDED, CAMPAIGN NOT VALID - 1234|XYZ

NOTICE: update\_lead NO MATCHES FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212

SUCCESS: update\_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4

SUCCESS: update\_lead LEAD HAS BEEN DELETED - 7275551111|6666|999|193716|-4

NOTICE: update\_lead CUSTOM FIELDS ENTRY DELETED 1 - 7275551111|6666|999|193716|-4

NOTICE: update\_lead CUSTOM FIELDS DATA HAS BEEN DELETED - 6666|193716|1|1

NOTICE: update\_lead LEADS FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212|101|101

NOTICE: update\_lead LEADS FOUND IN THE SYSTEM: |6666|1010542|12345678901234|9998887112|3333444|0  
(user|lead\_id|vendorleadcode|phone |list\_id|entry\_list\_id)

NOTICE: update\_lead ADDED TO HOPPER - 7275551111|6666|193715|1677922

NOTICE: update\_lead NOT ADDED TO HOPPER - 7275551111|6666|193715|1677922

NOTICE: update\_lead NOT ADDED TO HOPPER, OUTSIDE OF LOCAL TIME - 7275551111|193715|-5|0|6666

NOTICE: update\_lead NOT ADDED TO HOPPER, LEAD NOT FOUND - 7275551111|193715|6666

NOTICE: update\_lead NOT ADDED TO HOPPER, LEAD IS ALREADY IN THE HOPPER - 7275551111|193715|6666

NOTICE: update\_lead REMOVED FROM HOPPER - 7275551111|193715|READY|6666

NOTICE: update\_lead NOT REMOVED FROM HOPPER - 7275551111|193715|DNC|6666

NOTICE: update\_lead NOT REMOVED FROM HOPPER, LEAD IS NOT IN THE HOPPER - 7275551111|193715|6666

ERROR: update\_lead INVALID DATA FOR LEAD INSERTION - 6666|||

ERROR: update\_lead NO MATCHES FOUND IN THE SYSTEM - 6666|||

ERROR: update\_lead NO VALID SEARCH METHOD - 6666|SYSTEM|||

ERROR: update\_lead NOT A DEFINED LIST ID, LIST EXISTS CHECK ENABLED - 6666|139

ERROR: update\_lead USER DOES NOT HAVE PERMISSION TO UPDATE LEADS IN THE SYSTEM - 6666|0

ERROR: update\_lead NOT AN ALLOWED LIST ID - 7275551212|98762

## batch\_update\_lead

updates multiple leads in dialer \_list with single set of field values (limited field options)

NOTE: api user for this function must have modify\_leads set to 1 and user\_level must be set to 8 or higher

NOTE: This function will first find which leads exist and then update them all at once. As such, there will not be admin log entries associated with each individual lead modified

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)  
lead\_ids - must be all numbers and commas, 1-9 digit numbers separate by a comma

### SETTINGS FIELDS-

list\_exists\_check - Y or N, default is N. If the list\_id\_field is not a defined list in the system, it will ERROR and not update the leads.  
reset\_lead - Y or N, Setting this to Y will reset the called-since-last-reset flag of the lead, default is N.  
records - maximum number of records to update (defaults to '100'[most recently created leads])

### EDITABLE FIELDS-

user\_field - 1-20 characters, this updates the 'user' field in the dialer \_list table  
list\_id\_field - 3-12 digits, this updates the 'list\_id' field in the dialer \_list table  
status - 1-6 characters, not punctuation or spaces  
vendor\_lead\_code - 1-20 characters  
source\_id - 1-50 characters  
gmt\_offset\_now - overridden by auto-lookup of phone\_code and area\_code portion of phone number if applicable

title -	1-4 characters
first_name -	1-30 characters
middle_initial -	1 character
last_name -	1-30 characters
address1 -	1-100 characters
address2 -	1-100 characters
address3 -	1-100 characters
city -	1-50 characters
state -	2 characters
province -	1-50 characters
postal_code -	1-10 characters
country_code -	3 characters
gender -	U, M, F (Undefined, Male, Female) - defaults to 'U'
date_of_birth -	YYYY-MM-DD
alt_phone -	1-12 characters
email -	1-70 characters
security_phrase -	1-100 characters
comments -	1-255 characters
rank -	1-5 digits
owner -	1-20 characters (user ID, Territory or user group)
called_count -	digits only, the number of attempts dialing the lead
phone_code -	digits only, can be 1-4 digits

Example URL strings for API calls:

`http://server/dialer/non_agent_api.php?`

`source=test&user=6666&pass=1234&function=batch_update_lead&lead_ids=2345,2346&list_id_field=138`

Example responses:

SUCCESS: batch\_update\_lead LEADS HAVE BEEN UPDATED - 6666|2|2345,2346

ERROR: batch\_update\_lead USER DOES NOT HAVE PERMISSION TO UPDATE LEADS IN THE SYSTEM - 6666|0|

ERROR: batch\_update\_lead NO LEADS DEFINED - 6666|

ERROR: batch\_update\_lead NOT AN ALLOWED LIST ID - 6666|138

ERROR: batch\_update\_lead NOT A DEFINED LIST ID, LIST EXISTS CHECK ENABLED - 6666|138

ERROR: batch\_update\_lead NO LEADS FOUND - 6666|0|2345,2346

## add\_user

adds a user to the system

NOTE: api user for this function must have user\_level set to 8 or higher and "modify users" enabled

### REQUIRED FIELDS-

agent\_user - 2-20 characters (for auto-generated send 'AUTOGENERATED')

agent\_pass - 1-20 characters

agent\_user\_level - 1 through 9, one digit only

agent\_full\_name - 1-50 characters

agent\_user\_group - 1-20 characters, must be a valid user group

### OPTIONAL FIELDS-

phone\_login - 1-20 characters

phone\_pass - 1-20 characters

hotkeys\_active - 0 or 1

voicemail\_id - 1-10 digits

email - 1-100 characters

custom\_one - 1-100 characters

custom\_two - 1-100 characters  
custom\_three - 1-100 characters  
custom\_four - 1-100 characters  
custom\_five - 1-100 characters  
wrapup\_seconds\_override - number from -1 to 9999  
agent\_choose\_ingroups - 0 or 1, default 1  
agent\_choose\_blended - 0 or 1, default 1  
closer\_default\_blended - 0 or 1, default 0  
in\_groups - pipe-delimited list of inbound groups to make selected for the user "SALESLINE|SUPPORT"

NOTE: This function does not work with Vtiger integration

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?

source=test&function=add\_user&user=6666&pass=1234&agent\_user=1000&agent\_pass=9999&agent\_user\_level=1&agent\_full\_name=Testing+Person&agent\_user\_group=AGENTS

http://server/dialer /non\_agent\_api.php?

source=test&function=add\_user&user=6666&pass=1234&agent\_user=1000&agent\_pass=9999&agent\_user\_level=1&agent\_full\_name=Testing+Person&agent\_user\_group=AGENTS&phone\_login=100&phone\_pass=test&hotkeys\_active=1&voice\_email\_id=&custom\_one=jjjj&custom\_two=yyyy&custom\_three=kkk&custom\_four=www&custom\_five=hhhh

Example responses:

ERROR: add\_user USER DOES NOT HAVE PERMISSION TO ADD USERS - 6666|0

ERROR: add\_user YOU MUST USE ALL REQUIRED FIELDS - 6666|1000|||

ERROR: add\_user USER DOES NOT HAVE PERMISSION TO ADD USERS IN THIS USER LEVEL - 6666|8

ERROR: add\_user USER GROUP DOES NOT EXIST - 6666|ADFHR

ERROR: add\_user USER ALREADY EXISTS - 6666|6666

SUCCESS: add\_user USER HAS BEEN ADDED - 6666|1000|1234|8|Testing+Person|AGENTS

## copy\_user

copies an existing user in the system to a new user ID and name

NOTE: api user for this function must have user\_level set to 8 or higher and "modify users" enabled

### REQUIRED FIELDS-

agent\_user - 2-20 characters (for auto-generated send 'AUTOGENERATED')  
agent\_pass - 1-20 characters  
agent\_full\_name - 1-50 characters  
source\_user - 2-20 characters (must be an existing user ID in the system)

NOTE: This function does not work with Vtiger integration

**Example URL strings for API calls:**

http://server/dialer /non\_agent\_api.php?

source=test&function=copy\_user&user=6666&pass=1234&agent\_user=1000&agent\_pass=9999&source\_user=5555&agent\_full\_name=Copy+Person

**Example responses:**

ERROR: copy\_user USER DOES NOT HAVE PERMISSION TO COPY USERS - 6666|0

ERROR: copy\_user YOU MUST USE ALL REQUIRED FIELDS - 6666|1000|5555|||

ERROR: copy\_user USER DOES NOT HAVE PERMISSION TO COPY USERS IN THIS USER LEVEL - 9|8

ERROR: copy\_user SOURCE USER DOES NOT EXIST - 6666|5555

ERROR: copy\_user USER GROUP DOES NOT EXIST - 6666|ADFHR

ERROR: copy\_user USER ALREADY EXISTS - 6666|6666

SUCCESS: copy\_user USER HAS BEEN COPIED - 6666|1000|1234|Testing+Person|5555

## update\_user

updates or deletes a user entry already in the system

NOTE: api user for this function must have user\_level set to 8 or higher and "modify user" enabled

### REQUIRED FIELDS-

agent\_user - 2-20 characters

### OPTIONAL FIELDS-

agent\_pass - 1-20 characters

agent\_user\_level - 1 through 9, one digit only

agent\_full\_name - 1-50 characters

agent\_user\_group - 1-20 characters, must be a valid user group

phone\_login - 1-20 characters

phone\_pass - 1-20 characters

hotkeys\_active - 0 or 1

voicemail\_id - 1-10 digits

email - 1-100 characters

custom\_one - 1-100 characters

custom\_two - 1-100 characters

custom\_three - 1-100 characters

custom\_four - 1-100 characters

custom\_five - 1-100 characters

active - 'Y' or 'N'

wrapup\_seconds\_override - number from -1 to 9999

campaign\_rank - from -9 to 9, this will change the campaign rank for this user on all campaigns

campaign\_grade - from 1 to 10, this will change the campaign grade for this user on all campaigns

ingroup\_rank - from -9 to 9, this will change the in-group rank for this user on all in-groups

ingroup\_grade - from 1 to 10, this will change the in-group grade for this user on all in-groups

camp\_rg\_only - 0 or 1, this will set only one campaign rank/grade for this user, requires campaign\_id to be set

campaign\_id - only required for use with camp\_rg\_only

ingrp\_rg\_only - 0 or 1, this will set only one inbound group rank/grade for this user, requires group\_id to be set

group\_id - only required for use with ingrp\_rg\_only

reset\_password - 0 or 8+ digits, this will reset the user's password to a random password of this length and email the new password to the user

NOTE: the 'email' field is required if the user's current email is not a valid email address

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_pass=9876)

[source=test&function=update\\_user&user=6666&pass=1234&agent\\_user=2424&agent\\_user\\_level=3](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_user_level=3)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_full_name=Testing&hotkeys_active=1&active=Y)

[source=test&function=update\\_user&user=6666&pass=1234&agent\\_user=2424&campaign\\_rank=3&campaign\\_grade=4](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&campaign_rank=3&campaign_grade=4)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&ingroup_rank=3&ingroup_grade=4&ingrp_rg_only=1&group_id=TEST_IN)

[source=test&function=update\\_user&user=6666&pass=1234&agent\\_user=2424&reset\\_password=12&email=info@dialer.](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

[source=test&function=update\\_user&user=6666&pass=1234&agent\\_user=2424&reset\\_password=12&email=info@dialer.](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

[source=test&function=update\\_user&user=6666&pass=1234&agent\\_user=2424&reset\\_password=12&email=info@dialer.](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

[com](http://server/dialer/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&reset_password=12&email=info@dialer.com)

Example responses:

ERROR: update\_user USER DOES NOT HAVE PERMISSION TO UPDATE USERS - 6666|0  
ERROR: update\_user USER DOES NOT HAVE PERMISSION TO DELETE USERS - 6666|7878  
ERROR: update\_user YOU MUST USE ALL REQUIRED FIELDS - 6666||  
ERROR: update\_user USER DOES NOT EXIST - 6666|78789  
ERROR: update\_user USER DOES NOT HAVE PERMISSION TO UPDATE THIS USER - 6666|7878  
ERROR: update\_user YOU MUST USE A VALID FULL NAME, THIS IS AN OPTIONAL FIELD - 6666|  
ERROR: update\_user YOU MUST USE A VALID USER LEVEL, THIS IS AN OPTIONAL FIELD - 6666|0|9|1  
ERROR: update\_user YOU MUST USE A VALID USER GROUP, THIS IS AN OPTIONAL FIELD - 6666|  
FAKEGROU|0  
ERROR: update\_user YOU MUST USE A VALID PHONE LOGIN, THIS IS AN OPTIONAL FIELD - 6666|fakephone|0|  
0  
ERROR: update\_user YOU MUST USE A VALID PHONE PASSWORD, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_user YOU MUST USE A VALID HOTKEYS SETTING, THIS IS AN OPTIONAL FIELD - 6666|2  
ERROR: update\_user YOU MUST USE A VALID VOICEMAIL ID, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID EMAIL, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID CUSTOM ONE, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID CUSTOM TWO, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID CUSTOM THREE, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID CUSTOM FOUR, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user YOU MUST USE A VALID CUSTOM FIVE, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666  
ERROR: update\_user wrapup\_seconds\_override MUST BE A VALID DIGIT BETWEEN -1 AND 9999, THIS IS AN  
OPTIONAL FIELD - 6666|-2  
ERROR: update\_user YOU MUST USE A VALID CAMPAIGN RANK, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_user YOU MUST USE A VALID CAMPAIGN GRADE, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_user YOU MUST USE A VALID IN-GROUP RANK, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_user YOU MUST USE A VALID IN-GROUP GRADE, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_user NO UPDATES DEFINED - 6666|0  
NOTICE: update\_user USER CAMPAIGN RANKS/GRADES HAVE BEEN UPDATED - 6666|9|10|TESTCAMP|1  
NOTICE: update\_user USER IN-GROUP RANKS/GRADES HAVE BEEN UPDATED - 6666|9|10|TEST\_IN|1  
NOTICE: update\_user USER CAMPAIGN RANKS HAVE BEEN UPDATED - 6666|9|10  
NOTICE: update\_user USER CAMPAIGN RANKS HAVE BEEN UPDATED - 6666|9|10|TESTCAMP|1  
NOTICE: update\_user USER PASSWORD RESET FAILED: NO VALID EMAIL PROVIDED - 6666|email@doman  
NOTICE: update\_user USER PASSWORD RESET FAILED: EMAIL FAILURE - 6666|infdialer |email-error NOTICE:  
update\_user update\_user USER PASSWORD HAS BEEN RESET - 6666|infdialer  
SUCCESS: update\_user USER HAS BEEN UPDATED - 6666|7878  
SUCCESS: update\_user USER HAS BEEN DELETED - 6666|7878

## add\_group\_alias

adds group alias to the system

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

caller\_id\_number - 6-20 characters

### OPTIONAL FIELDS-

group\_alias\_id - 3-30 characters, no spaces or punctuation allowed, if not defined, caller\_id\_number is used

group\_alias\_name - 3-50 characters, if not defined, caller\_id\_number is used

caller\_id\_name - 6-20 characters, if not defined " is default

active - 'Y' or 'N', if not defined 'Y' is default

admin\_user\_group - a valid user group or '---ALL---' is used as default

Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&function=add_group_alias&user=6666&pass=1234&caller_id_number=7275551212 http://server/dialer /non_agent_api.php?`

`source=test&function=add_group_alias&user=6666&pass=1234&caller_id_number=7275551212&group_alias_id=test_group_alias&group_alias_name=test+group+alias`

Example responses:

ERROR: add\_group\_alias USER DOES NOT HAVE PERMISSION TO ADD GROUP ALIASES - 6666|0

ERROR: add\_group\_alias YOU MUST USE ALL REQUIRED FIELDS - 6666|||1000

ERROR: add\_group\_alias GROUP ALIAS ALREADY EXISTS - 6666|7275551212

SUCCESS: add\_group\_alias GROUP ALIAS HAS BEEN ADDED - 6666|7275551212|test\_group\_alias|test group alias

## add\_dnc\_phone

adds phone number to a DNC list in the system

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled

### REQUIRED FIELDS-

phone\_number - 6-20 characters

campaign\_id - 2-30 characters, should be a valid campaign ID or "SYSTEM\_INTERNAL" for the internal DNC list

### Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&function=add_dnc_phone&user=6666&pass=1234&phone_number=7275551212&campaign_id=TESTCAMP`

`http://server/dialer /non_agent_api.php?`

`source=test&function=add_dnc_phone&user=6666&pass=1234&phone_number=7275551212&campaign_id=SYSTEM_INTERNAL`

### Example responses:

ERROR: add\_dnc\_phone USER DOES NOT HAVE PERMISSION TO ADD DNC NUMBERS - 6666|0

ERROR: add\_dnc\_phone YOU MUST USE ALL REQUIRED FIELDS - 6666|||1000

ERROR: add\_dnc\_phone DNC NUMBER ALREADY EXISTS - 6666|7275551212

SUCCESS: add\_dnc\_phone DNC NUMBER HAS BEEN ADDED - 6666|7275551212|TESTCAMP

## add\_fpg\_phone

adds phone number to a Filter Phone Group in the system

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled

### REQUIRED FIELDS-

phone\_number - 6-20 characters

group - 2-30 characters, should be a valid Filter Phone Group ID in the system

### Example URL strings for API calls:

`http://server/dialer /non_agent_api.php?`

`source=test&function=add_fpg_phone&user=6666&pass=1234&phone_number=7275551212&group=TEST_IN_FILTER`

### Example responses:

ERROR: add\_fpg\_phone USER DOES NOT HAVE PERMISSION TO ADD FILTER PHONE GROUP NUMBERS - 6666|0



ERROR: add\_fpg\_phone YOU MUST USE ALL REQUIRED FIELDS - 6666|||1000  
ERROR: add\_fpg\_phone FILTER PHONE GROUP DOES NOT EXIST - 6666|TEST\_IN\_FILTER2  
ERROR: add\_fpg\_phone FILTER PHONE GROUP NUMBER ALREADY EXISTS - 6666|7275551212|  
TEST\_IN\_FILTER  
SUCCESS: add\_fpg\_phone FILTER PHONE GROUP NUMBER HAS BEEN ADDED - 6666|7275551212|  
TEST\_IN\_FILTER

## add\_phone

adds a phone to the system

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

extension -	2-100 characters
dialplan_number -	1-20 digits
voicemail_id -	1-10 digits
phone_login -	1-20 characters
phone_pass -	1-20 characters
server_ip -	7-15 characters, must be a valid server_ip
protocol -	Must be one of these: 'IAX2','SIP','Zap','EXTERNAL'
registration_password -	1-20 characters
phone_full_name -	1-50 characters
local_gmt -	timezone setting, not adjusting for DST, default: '-5.00'
outbound_cid -	1-20 digits

### OPTIONAL FIELDS-

phone_context -	a phone context, default is 'default'
email -	1-100 characters
admin_user_group -	a valid user group or '---ALL---
is_webphone -	Y, N or Y_API_LAUNCH: whether this phone should be treated as a webphone, default is N.
webphone_auto_answer -	Y or N: whether this phone should answer as soon as the call to the agent is placed, default is N.
use_external_server_ip -	Y or N: whether this phone should use the server's external IP for registration, default is N.
template_id -	1-15 characters, if defined it must be a valid template in the system
on_hook_agent -	Y or N: should this phone be treated as on-hook when an agent logs in with it, default is N.

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212)

source=test&function=add\_phone&user=6666&pass=1234&extension=55000&dialplan\_number=55000&voicemail\_id=55000&phone\_login=55000&phone\_pass=test&server\_ip=192.168.198.5&protocol=SIP&registration\_password=test&phone\_full\_name=Extension+55000&local\_gmt=-5.00&outbound\_cid=7275551212

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212&phone_context=default&email=test@test.com)

source=test&function=add\_phone&user=6666&pass=1234&extension=55000&dialplan\_number=55000&voicemail\_id=55000&phone\_login=55000&phone\_pass=test&server\_ip=192.168.198.5&protocol=SIP&registration\_password=test&phone\_full\_name=Extension+55000&local\_gmt=-5.00&outbound\_cid=7275551212&phone\_context=default&email=test@test.com

Example responses:

ERROR: add\_phone USER DOES NOT HAVE PERMISSION TO ADD PHONES - 6666|0

ERROR: add\_phone YOU MUST USE ALL REQUIRED FIELDS - 6666|1000|||||||||

ERROR: add\_phone SERVER DOES NOT EXIST - 6666|10.0.9.9

ERROR: add\_phone PHONE ALREADY EXISTS ON THIS SERVER - 6666|10.0.9.8|cc101

ERROR: add\_phone PHONE LOGIN ALREADY EXISTS - 6666|cc100

ERROR: add\_phone YOU MUST USE A VALID TIMEZONE - 6666|-5

ERROR: add\_phone TEMPLATE ID DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|cc100|batch

SUCCESS: add\_phone PHONE HAS BEEN ADDED - 6666|cc100|10.0.9.8|SIP|100

## update\_phone

updates or deletes a phone entry already in the system

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

extension - 2-100 characters  
server\_ip - 7-15 characters, must be a valid server\_ip

### SETTINGS FIELDS-

delete\_phone - Y or N, Setting this to Y will delete the phone from the system, default is N.

### EDITABLE FIELDS-

dialplan\_number - 1-20 digits  
voicemail\_id - 1-10 digits  
phone\_login - 1-20 characters  
phone\_pass - 1-20 characters  
protocol - Must be one of these: 'IAX2','SIP','Zap','EXTERNAL'  
registration\_password - 1-20 characters  
phone\_full\_name - 1-50 characters  
local\_gmt - timezone setting, not adjusting for DST, default: '-5.00'  
outbound\_cid - 6-18 digits  
outbound\_alt\_cid - 6-18 digits, to clear this field send '--BLANK--'  
phone\_context - a phone context, default is 'default'  
email - 5-100 characters, email address for voicemail, to clear this field send '--BLANK--'  
admin\_user\_group - a valid user group or '---ALL---'  
phone\_ring\_timeout - 1-3 digits, default '60'  
delete\_vm\_after\_email - Y or N, default 'N'  
is\_webphone - Y, N or Y\_API\_LAUNCH: whether this phone should be treated as a webphone, default is N.  
webphone\_auto\_answer - Y or N: whether this phone should answer as soon as the call to the agent is placed, default is N.  
use\_external\_server\_ip - Y or N: whether this phone should use the server's external IP for registration, default is N.  
template\_id - 1-15 characters, if defined it must be a valid template in the system  
on\_hook\_agent - Y or N: should this phone be treated as on-hook when an agent logs in with it, default is N.

Example URL strings for API calls:

`http://server/dialer/non_agent_api.php?`

`source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212`

`http://server/dialer/non_agent_api.php?`

`source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-`

`5.00&outbound_cid=7275551212&phone_context=default&email=test@test.com`

`http://server/dialer/non_agent_api.php?`

`source=test&function=update_phone&user=6666&pass=1234&extension=55000&server_ip=192.168.198.5&delete_phone=Y`

Example responses:

ERROR: update\_phone USER DOES NOT HAVE PERMISSION TO UPDATE PHONES - 6666|0

ERROR: update\_phone YOU MUST USE ALL REQUIRED FIELDS - 6666|

ERROR: update\_phone SERVER DOES NOT EXIST - 6666|10.0.9.9

ERROR: update\_phone PHONE DOES NOT EXIST ON THIS SERVER - 6666|10.0.9.8|cc101  
ERROR: update\_phone LOGIN ALREADY EXISTS - 6666|x101  
ERROR: update\_phone YOU MUST USE A VALID TIMEZONE - 6666|-99  
ERROR: update\_phone YOU MUST USE A VALID DIALPLAN NUMBER - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID VOICEMAIL NUMBER - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID PHONE PASSWORD - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID REGISTRATION PASSWORD - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID PROTOCOL - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID PHONE NAME - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID PHONE CONTEXT - 6666|0  
ERROR: update\_phone YOU MUST USE A VALID EMAIL - 6666|x.com  
ERROR: update\_phone NO UPDATES DEFINED - 6666|0  
ERROR: update\_phone ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone OUTBOUND CID MUST BE FROM 6 TO 18 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone OUTBOUND ALT CID MUST BE FROM 6 TO 18 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone USER GROUP MUST BE FROM 2 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone PHONE RING TIMEOUT MUST BE FROM 2 TO 180 SECONDS, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone DELETE VOICEMAIL AFTER EMAIL MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|0  
ERROR: update\_phone TEMPLATE ID DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|cc100|batch  
SUCCESS: update\_phone PHONE HAS BEEN UPDATED - 6666|cc100|10.0.9.8|SIP|100  
SUCCESS: update\_phone PHONE HAS BEEN DELETED - 6666|cc100|10.0.9.8|  
NOTICE: update\_phone USER DOES NOT HAVE PERMISSION TO DELETE PHONES - 6666|7878

## add\_phone\_alias

adds a phone alias entry to the system

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

alias\_id - 2-20 characters  
phone\_logins - 2-255 characters (phone logins separated by commas)  
alias\_name - 1-50 characters

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ+testing&phone_logins=100a,100b)

[source=test&function=add\\_phone\\_alias&user=6666&pass=1234&alias\\_id=xyz100&alias\\_name=XYZ+testing&phone\\_logins=100a,100b](http://server/dialer/non_agent_api.php?source=test&function=add_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ+testing&phone_logins=100a,100b)

Example responses:

ERROR: add\_phone\_alias USER DOES NOT HAVE PERMISSION TO ADD PHONE ALIASES - 6666|0  
ERROR: add\_phone\_alias YOU MUST USE ALL REQUIRED FIELDS - 6666|||  
ERROR: add\_phone\_alias PHONE ALIAS ALREADY EXISTS - 6666|x101  
ERROR: add\_phone\_alias PHONE DOES NOT EXIST - 6666|cc100  
SUCCESS: add\_phone\_alias PHONE ALIAS HAS BEEN ADDED - 6666|x100|testing\_x100|cc100,bb100

## update\_phone\_alias

updates or deletes a phone alias entry already in the system

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

alias\_id - 2-20 characters  
phone\_logins - 2-255 characters (phone logins separated by commas)  
alias\_name - 1-50 characters

### SETTINGS FIELDS-

delete\_alias - Y or N, Setting this to Y will delete the phone alias from the system, default is N.

Example URL strings for API calls:

`http://server/dialer/non_agent_api.php?`

`source=test&function=update_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ+testing+X&phone_logins=100a,100b`

`http://server/dialer/non_agent_api.php?`

`source=test&function=update_phone_alias&user=6666&pass=1234&alias_id=xyz100&delete_alias=Y`

Example responses:

ERROR: update\_phone\_alias USER DOES NOT HAVE PERMISSION TO UPDATE PHONE ALIASES - 6666|0

ERROR: update\_phone\_alias YOU MUST USE ALL REQUIRED FIELDS - 6666|

ERROR: update\_phone\_alias PHONE ALIAS DOES NOT EXIST - 6666|x101

ERROR: update\_phone\_alias YOU MUST USE A VALID ALIAS NAME - 6666|x

ERROR: update\_phone\_alias PHONE DOES NOT EXIST - 6666|cc100

SUCCESS: update\_phone\_alias PHONE ALIAS HAS BEEN UPDATED - 6666|x100|

SUCCESS: update\_phone\_alias PHONE ALIAS HAS BEEN DELETED - 6666|x100|

## server\_refresh

forces a conf file refresh on all telco servers in the cluster

NOTE: api user for this function must have user\_level set to 8 or higher and "ast admin access" enabled

### REQUIRED FIELDS-

stage - "REFRESH"

Example URL string for API calls: `http://server/dialer`

`/non_agent_api.php?source=test&function=server_refresh&user=6666&pass=1234&stage=REFRESH`

Example responses:

ERROR: server\_refresh USER DOES NOT HAVE PERMISSION TO REFRESH SERVERS - 6666|0

ERROR: server\_refresh YOU MUST USE ALL REQUIRED FIELDS - 6666|

SUCCESS: server\_refresh SERVER REFRESH HAS BEEN TRIGGERED - 6666|1

## add\_list

adds a list to the system

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled

## REQUIRED FIELDS-

list\_id - 2-14 digits  
list\_name - 6-30 characters  
campaign\_id - 2-8 characters, must be a valid campaign\_id

## OPTIONAL FIELDS-

active - Must be one of these: 'Y','N', will default to 'N'  
list\_description - up to 255 characters, to empty this field, set to --BLANK--  
outbound\_cid - 6-20 digits  
script - 1-10 characters, must be a valid script  
am\_message - 2-100 characters  
drop\_inbound\_group - 1-10 characters, must be a valid in-group  
web\_form\_address - 6-100 characters  
web\_form\_address\_two - 6-100 characters  
web\_form\_address\_three - 6-100 characters  
reset\_time - 4-100 characters, must be in valid 4-digit groups of 24-hour time (i.e. 0900-1700-2359)  
tz\_method - one of the following:  
COUNTRY\_AND\_AREA\_CODE,POSTAL\_CODE,NANPA\_PREFIX,OWNER\_TIME\_ZONE\_CODE default is COUNTRY\_AND\_AREA\_CODE  
local\_call\_time - must be a valid call time ID in the system or 'campaign' which is the default  
expiration\_date - 10 characters, must be in valid date format YYYY-MM-DD (i.e. 2012-11-25)  
xferconf\_one - Transfer - Conf Number Override 1: 1-50 characters  
xferconf\_two - Transfer - Conf Number Override 2: 1-50 characters  
xferconf\_three - Transfer - Conf Number Override 3: 1-50 characters  
xferconf\_four - Transfer - Conf Number Override 4: 1-50 characters  
xferconf\_five - Transfer - Conf Number Override 5: 1-50 characters  
custom\_fields\_copy - A valid list ID with custom fields to be copied to this new list, 2-14 digits  
custom\_copy\_method - (APPEND,UPDATE,REPLACE) method for how to perform the 'custom\_fields\_copy', default is APPEND

APPEND - the only 100% safe method, will not result in any lost existing data, only adds fields not present in the new list

UPDATE - will only update existing custom fields definitions to match the source list  
REPLACE - will delete all existing custom field lead data in new list and start clean

## NOTES:

- for the web form addresses, you can URL encode them to include standard URL special characters
- to use the 'custom\_fields\_copy' option, the API user must have the "Custom Fields Modify" user option enabled

## Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_list&user=6666&pass=1234&list_id=1101&list_name=Test+API+list&campaign_id=TESTCAMP)

source=test&function=add\_list&user=6666&pass=1234&list\_id=1101&list\_name=Test+API+list&campaign\_id=TESTCAMP

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_list&user=6666&pass=1234&list_id=1101&list_name=Test+API+list&campaign_id=TESTCAMP&active=N&outbound_cid=7275551212&script=DEMOSCRIPT&am_message=8304&drop_inbound_group=SALESLINE&web_form_address=http://www.dialer.org/?testing=hghg)

source=test&function=add\_list&user=6666&pass=1234&list\_id=1101&list\_name=Test+API+list&campaign\_id=TESTCAMP&active=N&outbound\_cid=7275551212&script=DEMOSCRIPT&am\_message=8304&drop\_inbound\_group=SALESLINE&web\_form\_address=http://www.dialer.org/?testing=hghg

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?source=test&function=add_list&user=6666&pass=1234&list_id=303&list_name=Test+API+list+3&campaign_id=TESTCAMP&custom_fields_copy=222)

source=test&function=add\_list&user=6666&pass=1234&list\_id=303&list\_name=Test+API+list+3&campaign\_id=TESTCAMP&custom\_fields\_copy=222

## Example responses:

ERROR: add\_list USER DOES NOT HAVE PERMISSION TO ADD LISTS - 6666|0

ERROR: add\_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1000||

ERROR: add\_list CAMPAIGN DOES NOT EXIST - 6666|TESTCIMP

ERROR: add\_list LIST ALREADY EXISTS - 6666|1101

ERROR: add\_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTSCRIPT

ERROR: add\_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TEST\_IN8

ERROR: add\_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: add\_list EXPIRATION DATE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: add\_list LOCAL CALL TIME DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: add\_list TIME ZONE METHOD IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: add\_list TRANSFER CONF OVERRIDE ONE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
 1234567890123456789012345678901234567890123456789012345678901  
 ERROR: add\_list TRANSFER CONF OVERRIDE TWO IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
 123456789012345678901234567890123456789012345678901  
 ERROR: add\_list TRANSFER CONF OVERRIDE THREE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
 123456789012345678901234567890123456789012345678901  
 ERROR: add\_list TRANSFER CONF OVERRIDE FOUR IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
 123456789012345678901234567890123456789012345678901  
 ERROR: add\_list TRANSFER CONF OVERRIDE FIVE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
 123456789012345678901234567890123456789012345678901  
 ERROR: add\_list CUSTOM FIELDS LIST ID TO COPY FROM DOES NOT EXIST, THIS IS AN OPTIONAL FIELD -  
 6666|1101|1102|0  
 ERROR: add\_list CUSTOM FIELDS LIST ID TO COPY FROM HAS NO CUSTOM FIELDS, THIS IS AN OPTIONAL  
 FIELD - 6666|1101|1102|0  
 ERROR: add\_list USER DOES NOT HAVE PERMISSION TO MODIFY CUSTOM FIELDS, THIS IS AN OPTIONAL  
 FIELD - 6666|1101|1102|0  
 FIELD - 6666|12SUCCESS: add\_list LIST HAS BEEN ADDED - 6666|1101|TESTCAMP

## update\_list

updates list information in the dialer \_lists table

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled

### REQUIRED FIELDS-

list\_id - must be all numbers, 2-14 digits  
 source - description of what originated the API call (maximum 20 characters)

### SETTINGS FIELDS-

insert\_if\_not\_found - Y or N, will attempt to insert as a new list if no match is found, default is N.  
 If list is not found, the function will change to add\_list and be processed in that way  
 reset\_list - Y or N, Setting this to Y will reset the Called-Since-Last-Reset flag for all of the leads in this list,  
 default is N.  
 delete\_list - Y or N, Setting this to Y will delete the list from the dialer \_lists table, default is N.  
 delete\_leads - Y or N, Setting this to Y will delete all of the leads with this list\_id from the dialer \_list table,  
 default is N.

### EDITABLE FIELDS-

list\_name - 6-30 characters  
 list\_description - up to 255 characters, to empty this field, set to --BLANK--  
 campaign\_id - 2-8 characters, must be a valid campaign\_id  
 active - Must be one of these: 'Y','N', will default to 'N'  
 outbound\_cid - 6-20 digits  
 script - 1-10 characters, must be a valid script  
 am\_message - 2-100 characters  
 drop\_inbound\_group - 1-10 characters, must be a valid in-group  
 web\_form\_address - 6-100 characters  
 web\_form\_address\_two - 6-100 characters  
 web\_form\_address\_three - 6-100 characters  
 reset\_time - 4-100 characters, must be in valid 4-digit groups of 24-hour time (i.e. 0900-1700-2359)  
 tz\_method - one of the following:

COUNTRY\_AND\_AREA\_CODE,POSTAL\_CODE,NANPA\_PREFIX,OWNER\_TIME\_ZONE\_CODE default is COUNTRY\_AND\_AREA\_CODE

local\_call\_time - must be a valid call time ID in the system or 'campaign' which is the default

expiration\_date - 10 characters, must be in valid date format YYYY-MM-DD (i.e. 2012-11-25)

xferconf\_one - Transfer - Conf Number Override 1: 1-50 characters

xferconf\_two - Transfer - Conf Number Override 2: 1-50 characters

xferconf\_three - Transfer - Conf Number Override 3: 1-50 characters

xferconf\_four - Transfer - Conf Number Override 4: 1-50 characters

xferconf\_five - Transfer - Conf Number Override 5: 1-50 characters

custom\_fields\_copy - A valid list ID with custom fields to be copied to the list being updated, 2-14 digits

custom\_copy\_method - (APPEND,UPDATE,REPLACE) method for how to perform the 'custom\_fields\_copy', default is APPEND

APPEND - the only 100% safe method, will not result in any lost existing data, only adds fields not present in the destination list

UPDATE - will only update existing custom fields definitions to match the source list, will not add new fields

REPLACE - will delete all existing custom field lead data in destination list and start clean with new fields

custom\_fields\_add - Must be one of these: 'Y','N', will default to 'N'. The fields below marked with a star(\*) are required for this to work:

field\_label\* - The label to use in the database for this custom field(only letters, numbers and underscore allowed)

field\_name\* - The visible name of the field in the form

field\_size\* - The size of the form field

field\_type\* - The type of field: TEXT, SELECT, AREA, etc... (see the Custom List Fields adminn

web page HELP for more info)

field\_rank\* - The order from top to bottom of where this field will appear in the form

field\_order - The horizontal order of the field, if there is more than one of the same rank

field\_rerank - If there is an existing field of the same rank, move the existing ones down the list,

'YES','NO' default is 'NO'

field\_max - The maximum size of data allowed in the field

field\_default - The default value of the field

field\_options - The field options for this field, If not POSTing variables, to start a new line, use '%0A',

for a pipe '|' use '%7C'

field\_duplicate - If this is a duplicate of another existing field for this list ID: 'Y','N' default is 'N'

field\_description - Description of the field

field\_help - The help text for this field as it appears to the agent in the custom form

field\_required - If this field is considered Required: 'Y','N' default is 'N'

multi\_position - The position of the field element: 'HORIZONTAL','VERTICAL' default is 'HORIZONTAL'

name\_position - The position of the name of the field: 'TOP','LEFT' default is 'LEFT'

field\_encrypt - If this is to be an encrypted field(a VICIhost-only feature, if enabled): 'Y','N' default is 'N'

field\_show\_hide - If the field is to be hidden(a VICIhost-only feature, if enabled):

'DISABLED','X\_OUT\_ALL','LAST\_1','LAST\_2','LAST\_3','LAST\_4','FIRST\_1\_LAST\_4'

custom\_fields\_update - Must be one of these: 'Y','N', will default to 'N'. The fields shown above are all optional except for 'field\_label' which is required for this to work

\* For 'custom\_fields\_update' only, you can set the following fields to '--BLANK--' to have them changed to an empty " value:

field\_description, \$field\_help, \$field\_options, \$field\_default

custom\_fields\_delete - Must be one of these: 'Y','N', will default to 'N'. The 'field\_label' field is required for this to work

**NOTES:**

- in order to set a field to empty("") set it equal to --BLANK--, i.e. "&drop\_inbound\_group=--BLANK--"
- please use no special characters like apostrophes, quotes or ampersands
- for the web form addresses, you can URL encode them to include standard URL special characters

Example URL strings for API calls:

[http://server/dialer/non\\_agent\\_api.php?](http://server/dialer/non_agent_api.php?)

source=test&user=6666&pass=1234&function=update\_list&list\_id=1101&list\_name=Updated+test+API+list



http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=1101&active=N http://server/dialer  
/non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=1102&active=N&insert\_if\_not\_found=Y&list\_name=  
Updated+test+API+list&campaign\_id=TESTCAMP&outbound\_cid=7275551212&script=DEMOSCRIP&am\_message=8  
304&drop\_inbound\_group=SALESLINE&web\_form\_address=http://www.dialer .org/?testing=hghg http://server/dialer  
/non\_agent\_api.php? source=test&user=6666&pass=1234&function=update\_list&list\_id=1102&reset\_list=Y  
http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=1102&delete\_list=Y&delete\_leads=Y  
http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=1102&campaign\_id=ASTRICON http://server/dialer  
/non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=99883&custom\_copy\_method=APPEND&custom\_fiel  
ds\_copy=9988  
http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=9988&custom\_fields\_add=Y&field\_label=new\_api\_fie  
ld4&field\_name=new+API+field4&field\_size=20&field\_type=TEXT&field\_rank=16 http://server/dialer  
/non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=9988&custom\_fields\_update=Y&field\_label=Utility&f  
ield\_options=1,1\_1\_hello%0A2,2\_2\_hello%0A3,3\_3\_hello  
http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=9988&custom\_fields\_update=Y&field\_label=bill\_peri  
od3&field\_options=source=%3Ebill\_start\_month%0Avalue=%3ESeptember%0Aoption=%3E%7Cselect%20bill-period-  
1%0Aoption=%3E1\_month%7C1%20Month%0Aoption=%3E2\_months%7C2%20Months%0Aoption=%3E3\_months  
%7C3%20Months%0Avalue=%3E%0Aoption=%3E%7Cno%20match http://server/dialer  
/non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=update\_list&list\_id=5040379&custom\_fields\_delete=Y&field\_label=new\_a  
pi\_field6

Example responses:

ERROR: update\_list USER DOES NOT HAVE PERMISSION TO UPDATE LISTS - 6666  
ERROR: update\_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1  
ERROR: update\_list NOT AN ALLOWED LIST ID - 98762  
NOTICE: update\_list LIST DOES NOT EXIST, SENDING TO add\_list FUNCTION - 6666|1000  
ERROR: update\_list LIST DOES NOT EXIST - 6666|1000  
ERROR: update\_list CAMPAIGN DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTCIMP  
ERROR: update\_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTSCRIPT  
ERROR: update\_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TEST\_IN8  
ERROR: update\_list LIST NAME MUST BE FROM 6 TO 30 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
test  
ERROR: update\_list ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U  
ERROR: update\_list OUTBOUND CID MUST BE FROM 6 TO 18 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|  
12345  
ERROR: update\_list ANSWERING MACHINE MESSAGE MUST LESS THAN 101 DIGITS, THIS IS AN OPTIONAL  
FIELD - 6666|123...  
ERROR: update\_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
ERROR: update\_list EXPIRATION DATE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
ERROR: update\_list TIME ZONE METHOD IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012  
ERROR: update\_list LOCAL CALL TIME DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|012  
ERROR: update\_list TRANSFER CONF OVERRIDE ONE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
123456789012345678901234567890123456789012345678901  
ERROR: update\_list TRANSFER CONF OVERRIDE TWO IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
123456789012345678901234567890123456789012345678901  
ERROR: update\_list TRANSFER CONF OVERRIDE THREE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
123456789012345678901234567890123456789012345678901  
ERROR: update\_list TRANSFER CONF OVERRIDE FOUR IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|  
123456789012345678901234567890123456789012345678901

ERROR: update\_list TRANSFER CONF OVERRIDE FIVE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|12345678901234567890123456789012345678901234567890123456789012345678901  
NOTICE: update\_list NO UPDATES DEFINED - 6666|  
SUCCESS: update\_list LIST HAS BEEN UPDATED - 6666|1101  
NOTICE: update\_list LEADS IN LIST HAVE BEEN RESET - 6666|1101|324  
NOTICE: update\_list LIST RESET FAILED, daily reset limit reached: 2 / 2 - 6666|1101  
NOTICE: update\_list USER DOES NOT HAVE PERMISSION TO DELETE LISTS - 6666|0  
NOTICE: update\_list LIST HAS BEEN DELETED - 6666|1101|1  
NOTICE: update\_list USER DOES NOT HAVE PERMISSION TO DELETE LEADS - 6666|0  
NOTICE: update\_list LEADS IN LIST HAVE BEEN DELETED - 6666|1101|324  
NOTICE: update\_list CUSTOM FIELDS LIST ID TO COPY FROM DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|1101|1102|0  
NOTICE: update\_list CUSTOM FIELDS LIST ID TO COPY FROM HAS NO CUSTOM FIELDS, THIS IS AN OPTIONAL FIELD - 6666|1101|1102|0  
NOTICE: update\_list USER DOES NOT HAVE PERMISSION TO MODIFY CUSTOM FIELDS, THIS IS AN OPTIONAL FIELD - 6666|1101|1102|0  
NOTICE: update\_list COPY CUSTOM FIELDS COMMAND SENT - 6666|1101|APPEND|ERROR: Fields not copied|  
NOTICE: update\_list COPY CUSTOM FIELDS COMMAND SENT - 6666|1101|APPEND|SUCCESS: Fields copied|  
NOTICE: update\_list CUSTOM FIELDS LIST ID TO ADD TO HAS NO CUSTOM FIELDS, THIS IS AN OPTIONAL FIELD - 6666|1101  
NOTICE: update\_list REQUIRED CUSTOM FIELDS VARIABLES ARE MISSING, FIELD NOT ADDED, THIS IS AN OPTIONAL FIELD - 6666|1101|||||  
NOTICE: update\_list CUSTOM FIELDS LIST ID TO UPDATE TO HAS NO CUSTOM FIELDS, THIS IS AN OPTIONAL FIELD - 6666|1101|||||  
NOTICE: update\_list REQUIRED CUSTOM FIELDS VARIABLES ARE MISSING, FIELD NOT UPDATED, THIS IS AN OPTIONAL FIELD - 6666|1101|||  
NOTICE: update\_list FIELD DOES NOT EXIST, FIELD NOT UPDATED, THIS IS AN OPTIONAL FIELD - 6666|1101|abc|||||  
NOTICE: update\_list CUSTOM FIELDS LIST ID TO DELETE TO HAS NO CUSTOM FIELDS, THIS IS AN OPTIONAL FIELD - 6666|1101|  
NOTICE: update\_list REQUIRED CUSTOM FIELDS VARIABLES ARE MISSING, FIELD NOT DELETED, THIS IS AN OPTIONAL FIELD - 6666|1101|||  
NOTICE: update\_list FIELD DOES NOT EXIST, FIELD NOT DELETED, THIS IS AN OPTIONAL FIELD - 6666|1101|abc|  
NOTICE: update\_list ADD CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|ERROR: Field not added|  
NOTICE: update\_list ADD CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|SUCCESS: Field added|  
NOTICE: update\_list UPDATE CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|ERROR: Field not updated|  
NOTICE: update\_list UPDATE CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|SUCCESS: Field updated|  
NOTICE: update\_list DELETE CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|ERROR: Field not deleted|  
NOTICE: update\_list DELETE CUSTOM FIELD COMMAND SENT - 6666|1101|new\_field|TEXT|SUCCESS: Field deleted|

## list\_info

summary information about a list

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled

### REQUIRED FIELDS-

list\_id - must be all numbers, 2-14 digits  
source - description of what originated the API call (maximum 20 characters)

### SETTINGS FIELDS- (optional)

leads\_counts - Y or N, will include the counts of all leads and NEW status leads in the response, default is 'N'

dialable\_count - Y or N, will use the list's campaign settings to provide a count of how many are dialable right now, default is 'N'  
stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header

**Example URL strings for API calls:**

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=list\_info&list\_id=1101&leads\_counts=Y&header=YES

**Example responses:**

ERROR: list\_info USER DOES NOT HAVE PERMISSION TO MODIFY LISTS - 6666  
ERROR: list\_info YOU MUST USE ALL REQUIRED FIELDS - 6666|1  
ERROR: list\_info NOT AN ALLOWED LIST ID - 98762  
ERROR: list\_info LIST DOES NOT EXIST - 98762

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following formats:

list\_id|list\_name|campaign\_id|active|list\_changedate|list\_lastcalldate|expiration\_date|resets\_today  
1101|performance list|TESTCAMP|Y|2019-09-02 08:52:50|2019-11-07 10:12:12|2099-12-31|0|

list\_id|list\_name|campaign\_id|active|list\_changedate|list\_lastcalldate|expiration\_date|resets\_today|all\_leads\_count|  
new\_leads\_count  
1101|performance list|TESTCAMP|Y|2019-09-02 08:52:50|2019-11-07 10:12:12|2099-12-31|0|59896|3

## list\_custom\_fields

shows the custom data fields that are in a list, or all lists

NOTE: api user for this function must have user\_level set to 8 or higher and "modify lists" enabled  
NOTE: this output will not include display-only fields in the FORM, only the non-default custom data fields, any DISPLAY, SCRIPT and SWITCH form elements will be ignored

**REQUIRED FIELDS-**

list\_id - must be all numbers, 2-14 digits, OR use "---ALL---" for all lists  
source - description of what originated the API call (maximum 20 characters)

**SETTINGS FIELDS- (optional)**

stage - the format of the exported data: csv, tab, pipe(default)  
header - include a header(YES) or not(NO). This is optional, default is not to include a header  
custom\_order - the order to put the custom fields into: table\_order, alpha\_up, alpha\_down (default is 'table\_order')

**Example URL strings for API calls:**

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=list\_custom\_fields&list\_id=1101&header=YES

**Example responses:**

ERROR: list\_custom\_fields CUSTOM LIST FIELDS ARE NOT ENABLED ON THIS SYSTEM - 6666  
ERROR: list\_custom\_fields USER DOES NOT HAVE PERMISSION TO MODIFY LISTS - 6666  
ERROR: list\_custom\_fields YOU MUST USE ALL REQUIRED FIELDS - 6666|1  
ERROR: list\_custom\_fields NOT AN ALLOWED LIST ID - 98762  
ERROR: list\_custom\_fields LIST DOES NOT EXIST - 98762

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following formats:

list\_id|list\_name|campaign\_id|active|list\_changedate|list\_lastcalldate|custom\_fields\_list\_space\_delimited  
1101|performance list|TESTCAMP|Y|2019-09-02 08:52:50|2019-11-07 10:12:12|fav\_color fav\_food res\_city res\_state  
res\_zip

## check\_phone\_number

allows you to check if a phone number is valid and dialable

NOTE: api user for this function must have user\_level set to 8 or higher

### REQUIRED FIELDS-

phone\_number - must be all numbers, 6-16 digits  
phone\_code - must be all numbers, 1-4 digits, defaults to 1 if not set  
local\_call\_time - must be a valid call time ID in the system

### OPTIONAL FIELDS-

postal\_code - must be 5 digits. Only works for USA zipcodes, needed for POSTAL tz\_method  
state - must be 2 letters. Only needed if state call time rules enabled  
owner - must be 2-5 letters. Only needed if using TZCODE tz\_method

### SETTINGS FIELDS-

dnc\_check - Y, N or AREACODE, default is N  
campaign\_dnc\_check - Y, N or AREACODE, default is N  
campaign\_id - 2-8 Character campaign ID, required if using campaign\_dnc\_check  
usacan\_prefix\_check - Y or N, default is N. Check for a valid 4th digit for USA and Canada phone numbers (cannot be 0 or 1)  
usacan\_areacode\_check - Y or N, default is N. Check for a valid areacode for USA and Canada phone numbers  
nanpa\_ac\_prefix\_check - Y or N, default is N. Check for a valid NANPA areacode and prefix, if optional NANPA data is on the system  
tz\_method - <empty>, POSTAL, TZCODE, NANPA or AREACODE, default is <empty> which will use the country code and AREACODE for time zone lookups  
system AREACODE relies on the phone number's areacode  
POSTAL relies on the postal\_code field  
TZCODE relies on the owner field being populated with a proper time zone code  
NANPA relies on the optional NANPA areacode prefix data being loaded on your system

(NOTE: you can do more than one method at once, i.e.: "POSTALTZCODE")

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
source=test&user=6666&pass=1234&function=check\_phone\_number&phone\_number=7275551111&call\_time=9am-9pm

http://server/dialer /non\_agent\_api.php?  
DB=0&source=test&function=check\_phone\_number&user=6666&pass=1234&owner=GST&postal\_code=81009&phone\_number=3125551212&local\_call\_time=9am-9pm&tz\_method=AREACODEPOSTALNANPATZCODE

Example responses:

ERROR: check\_phone\_number USER DOES NOT HAVE PERMISSION TO CHECK PHONE NUMBERS - |6666|0|  
ERROR: check\_phone\_number THIS IS NOT A VALID CALL TIME - |6666|badct|  
ERROR: check\_phone\_number NANPA options disabled, NANPA prefix data not loaded - 0|6666  
ERROR: check\_phone\_number INVALID PHONE NUMBER LENGTH - 72755|6666  
ERROR: check\_phone\_number INVALID PHONE NUMBER PREFIX - 72755|6666  
ERROR: check\_phone\_number INVALID PHONE NUMBER AREACODE - 72755|6666

ERROR: check\_phone\_number INVALID PHONE NUMBER NANPA AREACODE PREFIX - 7275551212|6666  
ERROR: check\_phone\_number PHONE NUMBER IN DNC - 7275551112|6666

A success response will show the results for each tz\_method used(with 0 or 1 for dialable and the gmt-offset) followed by a hash"#" and then the phone information after:

AREACODE: 1|-6#PHONE: 3125551212|1|||

AREACODE: 1|-6#POSTAL: 1|-7.0#TZCODE: 0|10#NANPA: 1|-6#PHONE: 3125551212|1|81009||GST|

## logged\_in\_agents

list of agents that are logged in to the system

NOTE: api user for this function must have user\_level set to 7 or higher and "view reports" enabled

### REQUIRED FIELDS-

source - description of what originated the API call (maximum 20 characters)

### OPTIONAL FIELDS-

campaigns - pipe-delimited list of campaigns to get status information for "TESTCAMP|INBOUND", default is all campaigns shown

user\_groups - pipe-delimited list of user groups to get status information for "ADMIN|AGENTS", default is all user groups shown

show\_sub\_status - show agent sub-status and pause\_code, requires log lookup, (YES|NO) default is NO

### SETTINGS FIELDS-

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=logged\_in\_agents&stage=csv&header=YES

Example responses:

ERROR: logged\_in\_agents USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: logged\_in\_agents NO LOGGED IN AGENTS

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

user|campaign\_id|session\_id|status|lead\_id|callerid|calls\_today|full\_name|user\_group|user\_level

6666|TESTCAMP|8600051|PAUSED|1079409||1|Admin|ADMIN|9

user,campaign\_id,session\_id,status,lead\_id,callerid,calls\_today,full\_name,user\_group,user\_level,pause\_code,sub\_status

6666,TESTCAMP,8600051,INCALL,1079409,M2260919190001079409,1,Admin,ADMIN,9,LOGIN,DEAD

4545,TESTCAMP,8600052,PAUSED,0,,0,4545,MIKESGROUP,8,LOGIN,

NOTE: real\_time\_sub\_status field can consist of: DEAD, DISPO, 3-WAY, PARK, RING, PREVIEW, DIAL or it can be empty.

## call\_status\_stats

report on number of calls made by campaign and ingroup, with hourly and status breakdowns

NOTE: api user for this function must have user\_level set to 8 or higher and "view reports" enabled

## REQUIRED FIELDS-

campaigns - Campaigns to return stats on. Use "---ALL---" or "ALLCAMPAIGNS" for all campaigns, or use single dash delimiters if requesting more than one specific campaign

## OPTIONAL FIELDS-

query\_date - Date to report on, leave blank to default to today's date. Must be in YYYY-MM-DD format

ingroups - List of ingroups to report on. Leave blank for all ingroups belonging to the campaigns specified in the "campaigns" variable.

Use dash delimiters if requesting more than one ingroup.

statuses - List of specific statuses to report on. Leave blank for all, or use dash delimiters if requesting more than one status.

### Example URL strings for API calls: <http://server/dialer>

[/non\\_agent\\_api.php?user=6666&pass=1234&function=call\\_status\\_stats&campaigns=---ALL---&query\\_date=2017-11-24](http://server/dialer/non_agent_api.php?user=6666&pass=1234&function=call_status_stats&campaigns=---ALL---&query_date=2017-11-24) (returns all campaigns and ingroups for 11/24/17) [http://server/dialer/non\\_agent\\_api.php?user=6666&pass=1234&function=call\\_status\\_stats&campaigns=TESTCAMP-TESTCAMP2&query\\_date=2017-11-24&statuses=NP-TD&ingroups=AGENTDIRECT](http://server/dialer/non_agent_api.php?user=6666&pass=1234&function=call_status_stats&campaigns=TESTCAMP-TESTCAMP2&query_date=2017-11-24&statuses=NP-TD&ingroups=AGENTDIRECT)

(returns stat counts for TESTCAMP and TESTCAMP2 campaigns, and AGENTDIRECT ingroup, for 11/24/27 for calls dispositioned as NP and TD)

### Example responses:

ERROR: call\_status\_stats INVALID OR MISSING CAMPAIGNS

ERROR: auth USER DOES NOT HAVE PERMISSION TO USE THIS FUNCTION

ERROR: call\_status\_stats USER DOES NOT HAVE PERMISSION TO VIEW STATS

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

campaign\_id/ingroup|total calls|human answered calls|hourly breakdown(HH-count,HH-count,etc...)|status breakdown(status-count,status-count,etc...)

Hourly and status breakdowns are delimited by comma, and each hour/status count is delimited by dash, as seen below:

TESTCAMP|26|26|00-0,01-1,02-1,03-0,04-0,05-0,06-0,07-0,08-0,09-0,10-0,11-3,12-4,13-2,14-4,15-1,16-0,17-2,18-0,19-0,20-0,21-6,22-1,23-1|NP-4,TD-22|

AGENTDIRECT|2|2|00-0,01-0,02-0,03-0,04-0,05-0,06-0,07-0,08-0,09-0,10-0,11-1,12-1,13-0,14-0,15-0,16-0,17-0,18-0,19-0,20-0,21-0,22-0,23-0|TD-2|

## call\_dispo\_report

call disposition breakdown report

NOTE: api user for this function must have user\_level set to 9 and "view reports" enabled

### REQUIRED FIELDS(one of the following)-

campaigns - Campaigns to return stats on. Use single dash delimiters if requesting more than one specific campaign

ingroups - In-Groups to return stats on. Use single dash delimiters if requesting more than one specific

inbound group

dids - DIDs to return stats on. Use single dash delimiters if requesting more than one specific DID

### OPTIONAL FIELDS-

query\_date - Date to report on, leave blank to default to today's date. Must be in YYYY-MM-DD format

end\_date - Date to report on, leave blank to default to today's date. Must be in YYYY-MM-DD format

statuses - List of specific statuses to report on. Leave blank for all, or use dash delimiters if requesting more than

one status.

categories - List of specific status categories to report on. Leave blank for all, or use dash delimiters if requesting more than one category.

users - List of specific users to report on. Use single dash delimiters if requesting more than one specific user

status\_breakdown - [0,1] Breakdown of all statuses within selected elements, default 0

show\_percentages - [0,1] (Only works if status\_breakdown above is enabled), will show percentages of statuses, default 0

file\_download - [0,1] Download as a CSV file, default 0

### Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=call\_dispo\_report&ingroups=TEST\_IN3-TEST\_IN2&query\_date=2018-02-05&end\_date=2018-02-07

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=call\_dispo\_report&ingroups=TEST\_IN3-TEST\_IN2&query\_date=2018-02-05&end\_date=2018-02-07&status\_breakdown=1

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=call\_dispo\_report&did\_patterns=7275551113&query\_date=2018-02-05&end\_date=2018-02-07&status\_breakdown=1

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=call\_dispo\_report&ingroups=TEST\_IN3-TEST\_IN2&query\_date=2018-02-05&end\_date=2018-02-07&status\_breakdown=1&show\_percentages=1

### Example responses:

ERROR: call\_dispo\_report INVALID OR MISSING CAMPAIGNS, INGROUPS, OR DIDS

ERROR: call\_dispo\_report USER DOES NOT HAVE PERMISSION TO USE THIS FUNCTION

ERROR: call\_dispo\_report USER DOES NOT HAVE PERMISSION TO VIEW STATS

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:

CAMPAIGN,TOTAL CALLS

TEST\_IN2,10

TEST\_IN3,110

TOTAL,120

CAMPAIGN,TOTAL CALLS,ACFLTR,NP,WAITTO,CLOSOP,DROP,INCALL,RQXFER,TD,TESTAM

TEST\_IN2,10,1,0,0,0,5,0,0,0,4

TEST\_IN3,110,0,5,13,9,3,1,47,1,31

TOTAL,120,1,5,13,9,8,1,47,1,35

CAMPAIGN,TOTAL CALLS,ACFLTR,NP,WAITTO,CLOSOP,DROP,INCALL,RQXFER,TD,TESTAM

TEST\_IN2,10,1 (10.0%),0 (0.0%),0 (0.0%),0 (0.0%),5 (50.0%),0 (0.0%),0 (0.0%),0 (0.0%),4 (40.0%)

TEST\_IN3,110,0 (0.0%),5 (4.5%),13 (11.8%),9 (8.2%),3 (2.7%),1 (0.9%),47 (42.7%),1 (0.9%),31 (28.2%)

TOTAL,120,1 (0.8%),5 (4.2%),13 (10.8%),9 (7.5%),8 (6.7%),1 (0.8%),47 (39.2%),1 (0.8%),35 (29.2%)

## update\_campaign

updates campaign information in the dialer\_campaigns table

NOTE: api user for this function must have user\_level set to 8 or higher and "modify campaigns" enabled

### REQUIRED FIELDS-

campaign\_id - 2-8 characters

source - description of what originated the API call (maximum 20 characters)

### EDITABLE FIELDS-

campaign\_name - 6-40 characters

active - Must be one of these: 'Y','N'  
 auto\_dial\_level - 2-5 characters, must be within valid range  
 adaptive\_maximum\_level - 3-20 digits  
 campaign\_vdad\_exten - 3-20 characters  
 hopper\_level - Must be from 1 to 2000  
 reset\_hopper - Must be one of these: 'Y','N', will default to 'N'  
 dial\_method - Must be one of these:  
 'MANUAL','RATIO','INBOUND\_MAN','ADAPT\_AVERAGE','ADAPT\_HARD\_LIMIT','ADAPT\_TAPERED'  
 dial\_timeout - Must be from 1 to 120  
 outbound\_cid - 1-20 digits  
 dial\_status\_add - 1-6 characters  
 dial\_status\_remove - 1-6 characters  
 lead\_filter\_id - Must be a valid Filter in the system, or '---NONE---' to not use a filter  
 xferconf\_one - Transfer - Conf Number 1: 1-50 characters  
 xferconf\_two - Transfer - Conf Number 2: 1-50 characters  
 xferconf\_three - Transfer - Conf Number 3: 1-50 characters  
 xferconf\_four - Transfer - Conf Number 4: 1-50 characters  
 xferconf\_five - Transfer - Conf Number 5: 1-50 characters  
 dispo\_call\_url - URL for the Dispo URL(If using a full non-local URL must include 'http://' or 'https://') Must be  
 URL-encoded if sending request as a URL  
 EXAMPLE URL-ENCODED URL: "http://dialer .org/query.php?var1=X&var2=y" = "http%3A%2F%2Fdialer .org%2Fquery.php%3Fvar1%3DX%26var2%3Dy"

**NOTES:**

- please use no special characters like apostrophes, quotes or ampersands

Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&campaign\_name=Updated+test+API+campaign&auto\_dial\_level=3.0  
 http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&active=N http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&reset\_hopper=Y  
 http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&dispo\_call\_url=http%3A%2F%2Fdialer .org%2Fquery.php%3Fvar1%3DX%26var2%3Dy http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&dispo\_call\_url=ALT  
 http://server/dialer /non\_agent\_api.php?  
 source=test&user=6666&pass=1234&function=update\_campaign&campaign\_id=TESTOUT&dial\_status\_add=A2&dial\_status\_remove=A3

Example responses:

ERROR: update\_campaign USER DOES NOT HAVE PERMISSION TO UPDATE CAMPAIGNS - 6666  
 ERROR: update\_campaign YOU MUST USE ALL REQUIRED FIELDS - 6666|1  
 ERROR: update\_campaign NOT AN ALLOWED CAMPAIGN ID - 98762  
 ERROR: update\_campaign CAMPAIGN DOES NOT EXIST - 6666|1000  
 ERROR: update\_campaign AUTO DIAL LEVEL MUST BE FROM 0 TO 18, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: update\_campaign DIAL METHOD IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|12  
 ERROR: update\_campaign ADAPT MAXIMUM DIAL LEVEL MUST BE FROM 1 TO 5 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|12  
 ERROR: update\_campaign ROUTING EXTENSION MUST BE FROM 3 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|12  
 ERROR: update\_campaign HOPPER LEVEL MUST BE FROM 1 TO 2000, THIS IS AN OPTIONAL FIELD - 6666|12345  
 ERROR: update\_campaign DIAL TIMEOUT MUST BE FROM 1 TO 120, THIS IS AN OPTIONAL FIELD - 6666|123  
 ERROR: update\_campaign CAMPAIGN NAME MUST BE FROM 6 TO 40 CHARACTERS, THIS IS AN OPTIONAL



FIELD – 6666|test  
 ERROR: update\_campaign CAMPAIGN CID MUST BE FROM 6 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|test  
 ERROR: update\_campaign CAMPAIGN LEAD FILTER MUST BE A VALID FILTER IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|test  
 ERROR: update\_campaign TRANSFER CONF NUMBER ONE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|123456789012345678901234567890123456789012345678901  
 ERROR: update\_campaign TRANSFER CONF NUMBER TWO IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|1234567890123456789012345678901234567890123456789012345678901  
 ERROR: update\_campaign TRANSFER CONF NUMBER THREE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|1234567890123456789012345678901234567890123456789012345678901  
 ERROR: update\_campaign TRANSFER CONF NUMBER FOUR IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|1234567890123456789012345678901234567890123456789012345678901  
 ERROR: update\_campaign TRANSFER CONF NUMBER FIVE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|1234567890123456789012345678901234567890123456789012345678901  
 ERROR: update\_campaign ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD – 6666|U  
 ERROR: update\_campaign DIAL STATUS ADD IS NOT VALID, THIS IS AN OPTIONAL FIELD - |6666|A1234567|  
 ERROR: update\_campaign DIAL STATUS ADD FAILURE, TOO MANY EXISTING DIAL STATUSES, THIS IS AN OPTIONAL FIELD - |6666|A12345|  
 ERROR: update\_campaign DIAL STATUS REMOVE IS NOT VALID, THIS IS AN OPTIONAL FIELD - |6666|A1234567|  
 ERROR: update\_campaign DIAL STATUS REMOVE FAILURE, NO EXISTING DIAL STATUSES SET, THIS IS AN OPTIONAL FIELD - |6666666|A12345|  
 ERROR: update\_campaign DIAL STATUS REMOVE FAILURE, NOT AN EXISTING DIAL STATUS, THIS IS AN OPTIONAL FIELD - |6666666|A12345|  
 NOTICE: update\_campaign NO UPDATES DEFINED - 6666|  
 NOTICE: update\_campaign HOPPER HAS BEEN RESET - 6666|1101|324  
 SUCCESS: update\_campaign CAMPAIGN HAS BEEN UPDATED – 6666|1101

## update\_alt\_url

updates/adds/displays alternate dispo call url entries for a campaign

NOTE: api user for this function must have user\_level set to 8 or higher and "modify campaigns" enabled

### REQUIRED FIELDS-

campaign_id -	2-8 characters
source -	description of what originated the API call (maximum 20 characters)
entry_type -	One of these: 'campaign'
url_type -	One of these: 'dispo','start','addlead','noagent'
alt_url_id -	Digits only, 'NEW' or 'LIST'. Must be a valid alt URL ID for this campaign, or set to 'NEW' to add a new ALT URL

NOTE: If only one Alt URL exists for this campaign and type, then this field can be left blank

NOTE: 'stage'(csv, tab, pipe[default]) and 'header'(YES, NO) options are available for an alt\_url\_id of 'LIST'

### EDITABLE FIELDS-

active -	One of these: 'Y','N', default is 'N'
url_rank -	Digits only
url_statuses -	FOR DISPO URLS ONLY! List of dispo statuses this URL is active for, separated by spaces, i.e.: "SALE1 SALE2" or can be set to "---ALL---"
url_description -	Text description of the alt URL
url_lists - all lists	Lists that the URL is active for, separated by spaces, i.e.: "101 102" or can be set to blank "" for all lists
url_call_length -	Digits only. Only calls that are this minimum length in seconds and higher, default is 0
url_address -	URL for the Alt URL(If using a full non-local URL must include 'http://' or 'https://') Must be

URL-encoded if sending request as a URL

EXAMPLE URL-ENCODED URL: "http://dialer .org/query.php?var1=X&var2=y" = "http%3A%2F%2Fdialer .org%2Fquery.php%3Fvar1%3DX%26var2%3Dy"

NOTES:

- Please use no special characters like apostrophes, quotes or ampersands
- A value of '--BLANK--' can be used on the url\_description and url\_lists options above to set their values to empty

Example URL strings for API calls:

```
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&active=N
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_rank=2
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_statuses=SALE+PSALE http://server/dialer
/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_description=Updated+SALE+URL http://server/dialer
/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_lists=101+102
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_call_length=2
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=3&url_address=http%3A%2F%2Fdialer .org%2Fquery.php%3Fvar1%3DX%26var2%3Dy
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=LIST
http://server/dialer /non_agent_api.php?
source=test&user=6666&pass=1234&function=update_alt_url&campaign_id=ALTTEST&entry_type=campaign&url_type
=dispo&alt_url_id=NEW&url_statuses=PRQUAL&url_description=Testing&url_address=http%3A%2F%2Fdialer .org
%2Fquery.php%3Fvar1%3DX%26var2%3Dy
```

Example responses:

```
ERROR: update_alt_url USER DOES NOT HAVE PERMISSION TO UPDATE CAMPAIGNS - 6666
ERROR: update_alt_url YOU MUST USE ALL REQUIRED FIELDS - 6666|1
ERROR: update_alt_url NOT AN ALLOWED CAMPAIGN ID - 98762
ERROR: update_alt_url CAMPAIGN DOES NOT EXIST - 6666|1000
ERROR: update_alt_url NO VALID URL TYPE DEFINED: - 6666||
ERROR: update_alt_url NO ENTRY TYPE DEFINED - 6666|
ERROR: update_alt_url CAMPAIGNS dispo URL IS NOT SET TO ALT - 6666|dispo|campaign|TESTCAMP
ERROR: update_alt_url ALT URL ID DOES NOT EXIST - 6666|2|dispo|campaign|TESTCAMP|2
ERROR: update_alt_url ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U
ERROR: update_alt_url URL ADDRESS IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|
ERROR: update_alt_url URL RANK IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|999999
ERROR: update_alt_url URL CAL LENGTH IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|999999
ERROR: update_alt_url URL STATUSES IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|
ERROR: update_alt_url URL DESCRIPTION IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|
ERROR: update_alt_url URL LISTS IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|
NOTICE: update_campaign NO UPDATES DEFINED - 6666|
SUCCESS: update_alt_url ALT URL HAS BEEN UPDATED - 6666|1|dispo|campaign|TESTCAMP
SUCCESS: update_alt_url ALT URL HAS BEEN ADDED - 6666|NEW URL ID: 2|dispo|campaign|TESTCAMP
```

NOTICE: update\_alt\_url LIST, No Records Found - 6666|dispo|campaign|TESTCAMP|0

A LIST response will not show "SUCCESS", but instead will just print the results in the following format:  
url\_id|campaign\_id|entry\_type|active|url\_type|url\_rank|url\_statuses|url\_description|url\_lists|url\_call\_length|url\_address  
3|ALTTEST|campaign|Y|dispo|2|SALE PSALE|Updated SALE URL||2|http://dialer .org/query.php?var1=X&var2=y

## add\_did

adds new Inbound DID entries to the system in the dialer \_inbound\_dids table

NOTE: api user for this function must have user\_level set to 8 or higher and "Modify DIDs" enabled

### REQUIRED FIELDS-

did\_pattern - 2-50 characters, must be a valid DID in the system  
NOTE: special characters in the did\_pattern need to be URL encoded, for example the plus sign '+' must be sent as '%2B'  
source - description of what originated the API call (maximum 20 characters)

### EDITABLE FIELDS-

did\_description - 6-50 characters  
active - Must be one of these: 'Y','N'  
did\_route - must be one of these:  
'EXTEN','VOICEMAIL','AGENT','PHONE','IN\_GROUP','CALLMENU','VMAIL\_NO\_INST'  
record\_call - must be one of these: 'Y','N','Y\_QUEUESTOP'  
extension - 1-50 digits  
exten\_context - 1-50 characters  
voicemail\_ext - 1-10 digits  
phone\_extension - 1-100 characters  
server\_ip - must be all numbers and dots, max 15 characters  
group - a valid in-group group\_id  
menu\_id - a valid call menu menu\_id  
filter\_clean\_cid\_number - 1-20 characters  
call\_handle\_method - If the route is IN\_GROUP, this is the call handle method(CID, CIDLOOKUP, CLOSER, etc...),  
default 'CID'  
agent\_search\_method - If the route is IN\_GROUP, this is the agent search method(LO = Load-Balanced-Overflow,  
LB = Load-Balanced, SO = Server-Only), default 'LB'  
list\_id - If the route is IN\_GROUP, this is the list ID(3-12 digits), default '999'  
entry\_list\_id - If the route is IN\_GROUP, this is the entry list ID(1-12 digits), default '0'  
campaign\_id - If the route is IN\_GROUP, this is the campaign ID, default ''  
phone\_code - If the route is IN\_GROUP, this is the phone code, default '1'

### Example URL strings for API calls:

http://server/dialer/non\_agent\_api.php?source=test&user=6666&pass=1234&function=add\_did&did\_pattern=  
%2B1727555112&did\_description=Updated+test+API+DID&active=Y http://server/dialer  
/non\_agent\_api.php?

source=test&user=6666&pass=1234&function=add\_did&did\_pattern=7275553331&did\_description=Testing+DID&active  
=N&did\_route=EXTEN&record\_call=Y\_QUEUESTOP&extension=8300&exten\_context=notdefault&voicemail\_ext=8301  
&phone\_extension=55000&server\_ip=192.168.198.5&group=TEST\_IN2&filter\_clean\_cid\_number=R10

### Example responses:

ERROR: add\_did USER DOES NOT HAVE PERMISSION TO ADD DIDS - 6666

ERROR: add\_did YOU MUST USE ALL REQUIRED FIELDS - 6666|1

ERROR: add\_did NOT AN ALLOWED DID - 98762

ERROR: add\_did DID ALREADY EXISTS - 6666|1000

ERROR: add\_did DID DESCRIPTION MUST BE FROM 6 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD -  
6666|012

ERROR: add\_did ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U

ERROR: add\_did DID ROUTE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|12  
 ERROR: add\_did RECORD CALL MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did EXTENSION MUST BE FROM 1 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did EXTENSION CONTEXT MUST BE FROM 1 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did VOICEMAIL EXTENSION MUST BE FROM 1 TO 10 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did PHONE EXTENSION MUST BE FROM 1 TO 100 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did SERVER IP MUST BE A VALID SERVER IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|0.0.0.0  
 ERROR: add\_did GROUP ID MUST BE A VALID INBOUND GROUP IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|test  
 ERROR: add\_did MENU ID MUST BE A VALID CALL MENU IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|test\_menu  
 ERROR: add\_did CLEAN CID NUMBER MUST BE FROM 1 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: add\_did CALL HANDLE METHOD MUST BE FROM 3 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: add\_did AGENT SEARCH METHOD MUST BE 2 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: add\_did LIST ID MUST BE FROM 3 TO 14 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: add\_did ENTRY LIST ID MUST BE FROM 1 TO 14 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|9999999999999999  
 ERROR: add\_did CAMPAIGN MUST BE FROM 1 TO 8 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|TESTCAMPS  
 ERROR: add\_did PHONE CODE MUST BE FROM 1 TO 10 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|999999999999  
 SUCCESS: add\_did DID HAS BEEN ADDED – 6666|1101

## update\_did

updates Inbound DID information in the dialer \_inbound\_dids table

NOTE: api user for this function must have user\_level set to 8 or higher and "Modify DIDs" enabled

### REQUIRED FIELDS-

did\_pattern - 2-50 characters, must be a valid DID in the system  
 NOTE: special characters in the did\_pattern need to be URL encoded, for example the plus sign '+' must be sent as '%2B'  
 source - description of what originated the API call (maximum 20 characters)

### EDITABLE FIELDS-

did\_description - 6-50 characters  
 active - Must be one of these: 'Y','N'  
 did\_route - must be one of these:  
 'EXTEN','VOICEMAIL','AGENT','PHONE','IN\_GROUP','CALLMENU','VMAIL\_NO\_INST'  
 record\_call - must be one of these: 'Y','N','Y\_QUEUESTOP'  
 extension - 1-50 digits  
 exten\_context - 1-50 characters  
 voicemail\_ext - 1-10 digits  
 phone\_extension - 1-100 characters  
 server\_ip - must be all numbers and dots, max 15 characters  
 group - a valid in-group group\_id  
 menu\_id - a valid call menu menu\_id

filter\_clean\_cid\_number - 1-20 characters  
 call\_handle\_method - If the route is IN\_GROUP, this is the call handle method(CID, CIDLOOKUP, CLOSER, etc...), default 'CID'  
 agent\_search\_method - If the route is IN\_GROUP, this is the agent search method(LO = Load-Balanced-Overflow, LB = Load-Balanced, SO = Server-Only), default 'LB'  
 list\_id - If the route is IN\_GROUP, this is the list ID(3-12 digits), default '999'  
 entry\_list\_id - If the route is IN\_GROUP, this is the entry list ID(1-12 digits), default '0'  
 campaign\_id - If the route is IN\_GROUP, this is the campaign ID, default ''  
 phone\_code - If the route is IN\_GROUP, this is the phone code, default '1'  
 delete\_did - Can be one of these: 'Y','N' (default is 'N')

**Example URL strings for API calls:**

http://server/dialer/non\_agent\_api.php?source=test&user=6666&pass=1234&function=update\_did&did\_pattern=%2B1727555112&did\_description=Updated+test+API+DID&active=Y http://server/dialer/non\_agent\_api.php?source=test&user=6666&pass=1234&function=update\_did&did\_pattern=7275553331&did\_description=Testing+DID&active=N&did\_route=EXTEN&record\_call=Y\_QUEUESTOP&extension=8300&exten\_context=notdefault&voicemail\_ext=8301&phone\_extension=55000&server\_ip=192.168.198.5&group=TEST\_IN2&filter\_clean\_cid\_number=R10

**Example responses:**

ERROR: update\_did USER DOES NOT HAVE PERMISSION TO UPDATE DIDS - 6666  
 ERROR: update\_did USER DOES NOT HAVE PERMISSION TO DELETE DIDS - 6666  
 ERROR: update\_did YOU MUST USE ALL REQUIRED FIELDS - 6666|1  
 ERROR: update\_did NOT AN ALLOWED DID - 98762  
 ERROR: update\_did DID DOES NOT EXIST - 6666|1000  
 ERROR: update\_did DID DESCRIPTION MUST BE FROM 6 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|012  
 ERROR: update\_did ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U  
 ERROR: update\_did DID ROUTE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|12  
 ERROR: update\_did RECORD CALL MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did EXTENSION MUST BE FROM 1 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did EXTENSION CONTEXT MUST BE FROM 1 TO 50 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did VOICEMAIL EXTENSION MUST BE FROM 1 TO 10 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did PHONE EXTENSION MUST BE FROM 1 TO 100 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did SERVER IP MUST BE A VALID SERVER IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|0.0.0.0  
 ERROR: update\_did GROUP ID MUST BE A VALID INBOUND GROUP IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|test  
 ERROR: update\_did MENU ID MUST BE A VALID CALL MENU IN THE SYSTEM, THIS IS AN OPTIONAL FIELD - 6666|test\_menu  
 ERROR: update\_did CLEAN CID NUMBER MUST BE FROM 1 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|  
 ERROR: update\_did CALL HANDLE METHOD MUST BE FROM 3 TO 20 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: update\_did AGENT SEARCH METHOD MUST BE 2 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: update\_did LIST ID MUST BE FROM 3 TO 14 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|1  
 ERROR: update\_did ENTRY LIST ID MUST BE FROM 1 TO 14 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|9999999999999999  
 ERROR: update\_did CAMPAIGN MUST BE FROM 1 TO 8 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|TESTCAMPS  
 ERROR: update\_did PHONE CODE MUST BE FROM 1 TO 10 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|999999999999  
 NOTICE: update\_did NO UPDATES DEFINED - 6666|  
 SUCCESS: update\_did DID HAS BEEN DELETED - 6666|23|1101

SUCCESS: update\_did DID HAS BEEN UPDATED - 6666|1101

## update\_cid\_group\_entry

updates CID Group entries in the dialer \_campaign\_cid\_areacodes table

NOTE: api user for this function must have user\_level set to 8 or higher and "Modify Campaigns" enabled

### REQUIRED FIELDS-

cid\_group\_id - 2-20 characters, must be a valid CID Group ID or Campaign ID in the system  
source - description of what originated the API call (maximum 20 characters)  
areacode - This should be either the AREACODE(i.e. "312") or STATE(i.e. "FL") or NONE of the CID Group entry, you can also set this to "---ALL---"  
stage - UPDATE, ADD, DELETE or INFO

### OPTIONAL FIELDS-

outbound\_cid - 1-20 digits, or (if you want to UPDATE, DELETE or INFO all entries for an areacode, you can set this to "---ALL---" or leave it blank)

### EDITABLE FIELDS-

cid\_description - 6-50 characters, default is blank  
active - Must be one of these: 'Y','N', default is 'N'

### Example URL strings for API calls:

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_cid\_group\_entry&stage=INFO&cid\_group\_id=TESTINX5&areacode=---ALL---

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_cid\_group\_entry&stage=ADD&cid\_group\_id=testing\_here4&areacode=312&outbound\_cid=3125551212&cid\_description=Testing+DID&active=N

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_cid\_group\_entry&stage=DELETE&cid\_group\_id=testing\_here4&areacode=312&outbound\_cid=3125551212

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_cid\_group\_entry&stage=UPDATE&cid\_group\_id=testing\_here4&areacode=312&outbound\_cid=3125551212&active=Y

http://server/dialer /non\_agent\_api.php?

source=test&user=6666&pass=1234&function=update\_cid\_group\_entry&stage=UPDATE&cid\_group\_id=testing\_here4&areacode=312&outbound\_cid=---ALL---&active=N&cid\_description=Deactivated+for+now

### Example responses:

ERROR: update\_cid\_group\_entry USER DOES NOT HAVE PERMISSION TO UPDATE CID GROUPS - 6666

ERROR: update\_cid\_group\_entry YOU MUST USE ALL REQUIRED FIELDS - 6666|1|

ERROR: update\_cid\_group\_entry NOT AN ALLOWED CID GROUP - 98762

ERROR: update\_cid\_group\_entry CID GROUP DOES NOT EXIST - 6666|1000

ERROR: update\_cid\_group\_entry THIS CID GROUP HAS NO ENTRIES - 6666|1000

SUCCESS: update\_cid\_group\_entry CID GROUP INFO AS FOLLOWS - 1101|---ALL---|---ALL---|3

1|727|7275551212|N|FL1 test|0

2|727|7275551313|N|FL1 test|0

4|998|7275551114|N|FL2 test|0

ERROR: update\_cid\_group\_entry YOU MUST DEFINE AN AREACODE WHEN ADDING AND ENTRY - 6666|1000|---ALL---

ERROR: update\_cid\_group\_entry YOU MUST DEFINE A CID NUMBER WHEN ADDING AND ENTRY - 6666|1000|1

ERROR: update\_cid\_group\_entry THIS CID GROUP ENTRY ALREADY EXISTS - 6666|1000|813|8135551212

SUCCESS: update\_cid\_group\_entry CID GROUP ENTRY HAS BEEN ADDED - 6666|1101|813|8135551212|1

SUCCESS: update\_cid\_group\_entry CID GROUP ENTRIES HAVE BEEN DELETED - 6666|1101|813|8135551212|1  
ERROR: update\_cid\_group\_entry NO UPDATES DEFINED - 6666|813|8135551212||  
SUCCESS: update\_cid\_group\_entry CID GROUP ENTRIES HAVE BEEN UPDATED – 6666|1101|813|8135551212|1

ERROR: NO FUNCTION SPECIFIED

## ***API functions for the Dialer Agent Screen***

Response to calls will return either an ERROR or a SUCCESS along with an explanation.  
for example:

SUCCESS: external\_status function set - 6666|A

ERROR: agent\_user is not logged in - 6666

ERROR: auth USER DOES NOT HAVE PERMISSION TO USE THIS FUNCTION - 6666|  
webservice|ADMIN

NOTE: The API is able to use HTTPS if your webservice is configured to use HTTPS.  
For example, all VICIhost accounts are able to use HTTPS for API functions

### **version**

shows version and build of the API, along with the date/time

#### **Values:**

NONE

#### Example URL:

<http://server/agc/api.php?function=version>

#### Example responses:

VERSION: 2.0.5-2|BUILD: 90116-1229|DATE: 2009-01-15 14:59:33|EPOCH: 1222020803

### **webservice**

shows version and build of the API, along with the date/time

#### **Values:**

NONE

#### Example URL:

<http://server/agc/api.php?source=test&user=6666&pass=1234&function=webservice>

#### Example responses:

Webservice Data:

set.timezone: America/New\_York

abbr.timezone: EDT

dst.timezone: 1

uname: Linux dev-db 2.6.34.8-0.2-default #1 SMP 2011-04-06 18:11:26 +0200 x86\_64

host name: dev-db

server name: www.dialer .org

php version: 5.3.3

apache version: Apache/2.2.15 (Linux/SUSE)

apache processes: 13



system loadavg: 0.06  
disk\_free\_space: 444174315520  
date.timezone: America/New\_York  
max\_execution\_time: 360  
max\_input\_time: 360  
memory\_limit: 128M  
post\_max\_size: 48M  
upload\_max\_filesize: 42M  
default\_socket\_timeout: 360

## external\_hangup

Hangs up the current customer call on the agent screen

### Values: (value)

1 - the only valid value for this function

### Example URL:

[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=external\\_hangup&value=1](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_hangup&value=1)

### Example responses:

ERROR: external\_hangup not valid - 1|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
SUCCESS: external\_hangup function set - 1|6666

## external\_status

Sets the status of the current customer call on the agent disposition screen

### Values:

(value)

value - Any valid status in the DIALER system will work for this function  
callback\_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback.  
REQUIRED if callback is set and status is flagged as a scheduled callback  
callback\_type - USERONLY or ANYONE, default is ANYONE  
callback\_comments - Optional comments to appear when the callback is called back, must be less than 200 characters in length  
qm\_dispo\_code - Option callstatus code used if QM is enabled

### Example URL:

[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=external\\_status&value=A](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=A)  
[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=external\\_status&value=CALLBK&callback\\_datetime=2012-01-25+12:00:00&callback\\_type=USERONLY&callback\\_comments=callback+comments+go+here&qm\\_dispo\\_code=1234](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=CALLBK&callback_datetime=2012-01-25+12:00:00&callback_type=USERONLY&callback_comments=callback+comments+go+here&qm_dispo_code=1234)

### Example responses:

ERROR: external\_status not valid - A|6666  
ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666  
SUCCESS: external\_status function set - A|6666

## external\_pause

Pauses or Resumes the agent. If a Pause and the agent is on a live call will pause after the live call is dispositioned

**Values:** (value)  
PAUSE - Pauses the agent session  
RESUME - Resumes the agent session

### Example URL:

http://server/agc/api.php?source=test&user=6666&pass=1234&agent\_user=1000&function=external\_pause&value=PAUSE  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=external\_pause&value=RESUME

### Example responses:

ERROR: external\_pause not valid - PAUSE|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
SUCCESS: external\_pause function set - PAUSE|1232020456|6666

## logout

Logs the agent out of the agent interface. If the agent is on a live call, will logout after the live call is dispositioned

**Values:** (value)  
LOGOUT - Logout the agent session

### Example URL:

http://server/agc/api.php?source=test&user=6666&pass=1234&agent\_user=1000&function=logout&value=LOGOUT

### Example responses:

ERROR: logout not valid - PAUSE|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
SUCCESS: logout function set - LOGOUT|1232020456|6666

## external\_dial

Places a manual dial phone call on the agent screen, you can define whether to search for the lead in the existing database or not and you can define the phone\_code and the number to dial. This action will pause the agent after their current call, enter in the information to place the call, and dialing the call on the agent screen.

**Values:**  
value - Any valid phone number (7275551212), or "MANUALNEXT" to mimic the

	Dial Next Number button
lead_id -	Any valid lead_id from the system(either value or lead_id are required) if both are defined, lead_id will override value
phone_code -	Any valid phone country code (1 for USA/Canada, 44 for UK, etc...)
search -	YES - perform a search in the campaign-defined dialer _list list for this phone number and bring up that lead NO - do not search, create a new dialer _list record for the call
preview -	YES - preview the lead in the dialer screen without dialing NO - do not preview the lead, place call immediately
focus -	YES - change the focus of the screen to the dialer .php agent interface, brings up an alert in the browser window NO - do not change focus
vendor_id -	OPTIONAL, any valid Vendor lead code
dial_prefix -	OPTIONAL, any dial prefix that you want to add to the beginning of the dial string for this call
group_alias -	OPTIONAL, the outbound callerID(from an existing group-alias) that you want to use for this call
vtiger_callback -	OPTIONAL, YES or NO, will lookup the phone number and Vtiger account ID from the provided Event ID
alt_user -	OPTIONAL, instead of agent_user, this is to lookup the agent_user using the dialer _users.custom_three field
alt_dial -	OPTIONAL, if using lead_id you can set this flag to dial the ALT number or the ADDR3 number or SEARCH a phone_number within the lead if SEARCH is used and the phone_number is not matched with the lead's phone_number, alt_phone or address3 field an ERROR will be returned
dial_ingroup -	OPTIONAL, place the call as an in-group outbound calls
outbound_cid -	OPTIONAL, the CallerID to send for this outbound call. NOTE: This will only work if "Outbound Call Any CID" is enabled in System Settings!

#### Example URL:

[http://server/agg/api.php?](http://server/agg/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES)

source=test&user=6666&pass=1234&agent\_user=1000&function=external\_dial&value=7275551212&phone\_code=1&search=YES&preview=NO&focus=YES

[http://server/agg/api.php?](http://server/agg/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES&dial_prefix=88&group_alias=DEFAULT)

source=test&user=6666&pass=1234&agent\_user=1000&function=external\_dial&value=7275551212&phone\_code=1&search=YES&preview=NO&focus=YES&dial\_prefix=88&group\_alias=DEFAULT

#### Example responses:

NOTICE: defined dial\_ingroup not found - FAKE\_INGROUP

ERROR: external\_dial not valid - 7275551212|1|YES|6666

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

ERROR: agent\_user is not allowed to place manual dial calls - 6666

ERROR: caller\_id\_number from group\_alias is not valid - 6666|TESTING|123

ERROR: group\_alias is not valid - 6666|TESTING

ERROR: outbound\_cid is not allowed on this system - 6666|3125551212|DISABLED

ERROR: vtiger callback activity does not exist in vtiger system - 12345

ERROR: phone\_number is already in this agents manual dial queue - 6666|7275551211

ERROR: lead\_id is not valid - 6666|1234567

ERROR: phone number is not valid - 6666|1234567|

ERROR: phone number lead\_id search not found - 6666|7275551212|1234567|  
SUCCESS: external\_dial function set - 7275551212|6666|1|YES|NO|YES|123456|1232020456|9|TESTING|7275551211|

## preview\_dial\_action

sends a SKIP, DIALONLY, ALTDIAL, ADR3DIAL or FINISH when a lead is being previewed or in Manual Alt Dial

**Values:** (value)  
agent\_user - REQUIRED alphanumeric string for active agent user  
value - One of the following actions (SKIP, DIALONLY, ALTDIAL, ADR3DIAL or FINISH)

### Example URLs:

http://server/agg/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=preview\_dial\_action&value=SKIP

### Responses:

ERROR: preview\_dial\_action not valid - 7275551212|1|YES|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: agent\_user is not allowed to place manual dial calls - 6666  
ERROR: preview dialing not allowed on this campaign - 6666|TESTING|DISABLED  
ERROR: preview dial skipping not allowed on this campaign - 6666|TESTING|PREVIEW\_ONLY  
ERROR: alt number dialing not allowed on this campaign - 6666|TESTING|N  
SUCCESS: preview\_dial\_action function set - DIALONLY|6666|DIALONLY

## external\_add\_lead

Adds a lead in the manual dial list of the campaign for logged-in agent. A much simplified add lead function compared to the Non-Agent API function

### **Values:**

agent\_user - REQUIRED alphanumeric string for agent user  
dnc\_check - OPTIONAL - Check for number against system DNC  
campaign\_dnc\_check - OPTIONAL - Check for number against campaign DNC from the agent's campaign  
LEAD DATA (must populate at least one)

NOTE: Only fields that are specified in the API call will be modified

- address1
- address2
- address3
- alt\_phone
- city
- comments
- country\_code
- date\_of\_birth
- email
- first\_name
- gender
- gmt\_offset\_now

last\_name  
middle\_initial  
phone\_number  
phone\_code  
postal\_code  
province  
security\_phrase  
source\_id  
state  
title  
vendor\_lead\_code  
rank  
owner

### Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=external\_add\_lead&phone\_number=7275551212&phone\_code=1&first\_name=Bob&last\_name=Smith=NO&dnc\_check=YES

### Example responses:

ERROR: external\_add\_lead not valid - 7275551212|1|6666|  
ERROR: no user found - 6666  
ERROR: lead insertion failed - 7275551212|TESTCAMP|101|6666  
ERROR: add\_lead PHONE NUMBER IN DNC - 7275551212|6666  
ERROR: add\_lead PHONE NUMBER IN CAMPAIGN DNC - 7275551212|TESTCAMP|6666  
ERROR: campaign manual dial list undefined - 7275551212|TESTCAMP|6666  
ERROR: agent\_user is not logged in - 6666  
SUCCESS: lead added - 7275551212|TESTCAMP|101|123456|6666

## **change\_ingroups**

This function will change the selected in-groups for an agent that is logged into a campaign that allows for inbound calls to be handled. Allows the selected in-groups for an agent to be changed while they are logged-in to the Dialer Agent screen only. Once changed in this way, the agent would need to log out and back in to be able to select in-groups themselves (If Agent Choose In-Groups is enabled for that user). The blended checkbox can also be changed using this function. The API user performing this function must have dialer\_users.change\_agent\_campaign = 1.

### **Values:**

value - CHANGE - will change all in-groups to those defined in ingroup\_choices  
REMOVE - will only remove the listed in-groups  
ADD - will only add the listed in-groups  
blended - YES - set the agent to take outbound auto-dialed calls (not applicable in MANUAL and INBOUND\_MAN dial method campaigns)  
NO - set the agent to only take inbound calls  
ingroup\_choices - OPTIONAL, a space-delimited (use plusses + in the URL) list of in-groups to allow the agent to take calls from, example: " TEST\_IN2 SALESLINE TRAINING\_IN -"  
set\_as\_default - OPTIONAL, YES or NO - overwrites the settings for the agent in the user modification screen, default is NO

### Example URL:

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=change\_ingroups&value=CHANGE&set\_as\_default=YES&blended=YES&ingroup\_choices=+TEST\_IN+SALESLINE+FAKE\_IN+-

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=change\_ingroups&value=REMOVE&blended=NO&ingroup\_choices=+TEST\_IN2+TEST\_IN4+-

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=change\_ingroups&value=ADD&blended=NO&ingroup\_choices=+TEST\_IN2+-

### Example responses:

ERROR: change\_ingroups not valid - N| TEST\_IN SALESLINE -

ERROR: agent\_user is not logged in - 6666

ERROR: campaign does not allow inbound calls - 6666

ERROR: user is not allowed to change agent in-groups - 6666|TESTING|123

ERROR: campaign dial\_method does not allow outbound autodial - 6666|TESTING

ERROR: ingroup does not exist - FAKE\_IN| TEST\_IN FAKE\_IN SALESLINE -

ERROR: ingroup\_choices are required for ADD and REMOVE values - ADD|

SUCCESS: change\_ingroups function set - YES| TEST\_IN SALESLINE -|6666

## **update\_fields**

Updates the fields that are specified with the values. This will update the data that is on the agent's screen in the customer information section.

**Values:** (value)

agent\_user - REQUIRED alphanumeric string for agent user LEAD DATA (must populate at least one)

NOTE: Only fields that are specified in the API call will be modified

address1

address2

address3

alt\_phone

city

comments

country\_code

date\_of\_birth

email

first\_name

gender

gmt\_offset\_now

last\_name

middle\_initial

phone\_number

phone\_code

postal\_code

province

security\_phrase

source\_id

state  
title  
vendor\_lead\_code  
rank  
owner

#### OPTIONAL NON-LEAD TRIGGERS -

formreload  
scriptreload  
script2reload  
emailreload  
chatreload

#### NOTES:

- most special characters are not allowed, but single quotes are allowed

#### Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&function=update\_fields&agent\_user=6666&vendor\_lead\_code=1234567&address1=

#### Example responses:

ERROR: update\_fields not valid - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: user is not allowed to modify lead information - 6666|1234  
ERROR: agent\_user does not have a lead on their screen - 6666|1234  
ERROR: no fields have been defined - 6666  
SUCCESS: update\_fields lead updated - 6666|1234|87498|vendor\_lead\_code='1234567',address1=

## **set\_timer\_action**

Triggers specific agent screen actions after a set number of seconds, like the Webform, a Transfer-Conf Preset call or a message to be displayed on the agent screen.

**Values:** (value)  
agent\_user - REQUIRED, alphanumeric string for agent user  
value - REQUIRED, one of these choices:  
'NONE','WEBFORM','WEBFORM2','D1\_DIAL','D2\_DIAL','D3\_DIAL',  
'D4\_DIAL','D5\_DIAL','MESSAGE\_ONLY'  
notes - Optional, the message to be displayed with the timer action  
rank - Optional, the number of seconds into the call to display

#### Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&function=set\_timer\_action&agent\_user=6666&value=MESSAGE\_ONLY&notes=tes  
t+message&rank=15

#### Example responses:

ERROR: set\_timer\_action not valid - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: user is not allowed to modify campaign settings - 6666|1234

SUCCESS: set\_timer\_action lead updated - 6666|1234|MESSAGE\_ONLY|test message|15

## st\_login\_log

Looks up the dialer \_users.custom\_three field(as "agentId") to associate with a dialer user ID. If found it will populate the custom\_four field with a "teamId" value, then output the dialer user ID

**Values:** (value)  
value - REQUIRED alphanumeric string for CRM AgentID  
vendor\_id - REQUIRED alphanumeric string for CRM TeamID

### Example URL:

[http://server/agc/api.php?source=test&user=6666&pass=1234&function=st\\_login\\_log&value=876543&vendor\\_id=207](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_login_log&value=876543&vendor_id=207)

### Example responses:

ERROR: st\_login\_log not valid - 6666|207  
ERROR: no user found - 6666  
SUCCESS: st\_login\_log user found - 6666

## st\_get\_agent\_active\_lead

Looks up the dialer \_users.custom\_three field(as "agentId") to associate with a dialer user ID. If found it will output the active lead\_id and phone number, vendor\_lead\_code, province, security\_phrase and source\_id fields.

**Values:** (value)  
value - REQUIRED alphanumeric string for CRM AgentID  
vendor\_id - REQUIRED alphanumeric string for CRM TeamID

### Example URL:

[http://server/agc/api.php?source=test&user=6666&pass=1234&function=st\\_get\\_agent\\_active\\_lead&value=876543&vendor\\_id=207](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_get_agent_active_lead&value=876543&vendor_id=207)

### Example responses:

ERROR: st\_get\_agent\_active\_lead not valid - 6666|207  
ERROR: no user found - 6666  
ERROR: user not logged in - 6666  
ERROR: no active lead found - 6666  
SUCCESS: st\_get\_agent\_active\_lead lead found - 6666|7275551212|123456|9987-1234765|SK|WILLIAMS|JUH764AJJ9

## ra\_call\_control

Allows for remote agent call control: hangup/transfer calls being handled by remote agents, also options for logging a disposition and call length

**Values:** (value)  
value - REQUIRED, The call ID of the call as received as CallerIDname field or a special SIP header, i.e. Y0315201639000402027  
agent\_user - REQUIRED, alphanumeric string for remote agent user



stage - REQUIRED, one of these choices:  
'HANGUP','EXTENSIONTRANSFER','INGROUPTRANSFER'  
ingroup\_choices - OPTIONAL, only required if INGROUPTRANSFER stage is used, must be a single active in-group, reserved option of "DEFAULTINGROUP" can be used to send the call to the default in-group for the in-group or campaign that originated the call to the remote agent  
phone\_number - OPTIONAL, only required if EXTENSIONTRANSFER stage is used, must be a full number when dialed that will dial through the default context  
status - OPTIONAL, status of the call, maximum of 6 characters, if not set, status will be RAXFER

Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1028&function=ra\_call\_control&stage=INGROUPTRANSFER&ingrou  
p\_choices=DEFAULTINGROUP&value=Y0316001655000402028

Example responses:

ERROR: ra\_call\_control not valid - Y0315201639000402027|6666|INGROUPTRANSFER  
ERROR: no user found - 6666  
ERROR: user not logged in - 6666  
ERROR: no active call found - Y0315201639000402027  
ERROR: phone\_number is not valid - 9  
ERROR: ingroup is not valid - TESTINGROUP  
ERROR: stage is not valid - XYZ  
SUCCESS: ra\_call\_control transferred - 6666|Y0315201639000402027|SALESLINE  
SUCCESS: ra\_call\_control hungup - 6666|Y0315201639000402027|HANGUP

## send\_dtmf

Sends dtmf signal string to agent's session

**Values:** (value) only valid DTMF characters with these replacements:

- P = # (pound or hash)
- S = \* (star)
- Q = (one second of silence)

Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=send\_dtmf&value=QQQQ1234SQQQQQ6654P

Example responses:

ERROR: send\_dtmf not valid - QQ|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
SUCCESS: send\_dtmf function set - QQQQ1234SQQQQQ6654P|6666

## park\_call

sends command to park customer or grab customer out of park

**Values:** (value)  
value - REQUIRED, choices are below  
PARK\_CUSTOMER - send customer to the park extension as defined in the campaign the agent is logged into  
GRAB\_CUSTOMER - grab customer from the park extension and send them to the agent session  
PARK\_IVR\_CUSTOMER - send customer to the park ivr as defined in the campaign the agent is logged into, customer will come back after finishing IVR  
GRAB\_IVR\_CUSTOMER - grab customer from the park ivr and send them to the agent session

Example URL:

http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=park\_call&value=PARK\_CUSTOMER  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=park\_call&value=GRAB\_CUSTOMER  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=park\_call&value=PARK\_IVR\_CUSTOMER  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=park\_call&value=GRAB\_IVR\_CUSTOMER

Example responses:

ERROR: park\_call not valid - PARK\_CUSTOMER|6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: agent\_user does not have a lead on their screen - 6666  
SUCCESS: park\_call function set - PARK\_CUSTOMER|6666

**transfer\_conference**

sends several commands related to the agent transfer-conf frame

**Values:** (value)  
value - REQUIRED, choices are below  
HANGUP\_XFER - hangup the third party line  
HANGUP\_BOTH - hangup customer and third party line  
BLIND\_TRANSFER - send a call to a defined phone number  
LEAVE\_VM - blind transfer customer to the campaign-defined voicemail message  
LOCAL\_CLOSER - send call to another Dialer agent, must have in-group, optional phone\_number field for AGENTDIRECT agent  
DIAL\_WITH\_CUSTOMER - 3-way call with customer on the line  
PARK\_CUSTOMER\_DIAL - send customer to park and place a call to a third party  
LEAVE\_3WAY\_CALL - leave customer and third party in conference and go to the disposition screen  
phone\_number - OPTIONAL/REQUIRED, required for any transfer or dial value  
ingroup\_choices - OPTIONAL/REQUIRED, required for local\_closer and consultative transfers, must be a single active in-group, reserved option of "DEFAULTINGROUP" can be used to select the default in-group for the in-group or campaign that the call originated from  
consultative - OPTIONAL, when you want to do a consultative transfer with your customer and another Dialer agent, 'YES' and 'NO' are valid options, you can only use this with DIAL\_WITH\_CUSTOMER or PARK\_CUSTOMER\_DIAL  
dial\_override - OPTIONAL, dials exactly the phone number specified with no campaign-

group\_alias - defined phone code or prefix, 'YES' and 'NO' are valid options  
OPTIONAL, defines what caller ID number to use when doing  
DIAL\_WITH\_CUSTOMER or PARK\_CUSTOMER\_DIAL  
cid\_choice - OPTIONAL, alternate method for caller ID number to use when doing  
DIAL\_WITH\_CUSTOMER or PARK\_CUSTOMER\_DIAL:  
'CAMPAIGN','AGENT\_PHONE','CUSTOMER','CUSTOM\_CID'

### Example URL:

```
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=HANGUP_XFER
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=HANGUP_BOTH
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=BLIND_TRANSFER&phone_number=8500
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LEAVE_VM
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=DEFAULTINGROUP
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=AGENTDIRECT&phone_number=6666
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=SALESLINE
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&ingroup_choices=TEST_IN3&consultative=YES
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&phone_number=8500
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&phone_number=919998888112&dial_override=YES
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=PARK_CUSTOMER_DIAL&ingroup_choices=TEST_IN3&consultative=YES
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LEAVE_3WAY_CALL
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&phone_number=919998888112&cid_choice=CUSTOMER
```

### Example responses:

```
ERROR: transfer_conference not valid - QQ|6666
ERROR: value is not valid - XYZFUNCTION|6666
ERROR: no user found - 6666
ERROR: ingroup is not valid - XYZINGROUP
ERROR: agent_user is not logged in - 6666
ERROR: agent_user does not have a live call - 6666
ERROR: caller_id_number from group_alias is not valid - 6666|TESTING|123
ERROR: group_alias is not valid - 6666|TESTING
ERROR: cid_choice is not valid - 6666|TESTING
SUCCESS: transfer_conference function set - LOCAL_CLOSER|SALESLINE|YES|6666|M214184258000000044|
```

## recording

sends a recording start/stop signal or status of agent recording

### Values:

- value - REQUIRED, choices are below
- START - sends a "start recording" signal to the agent screen  
(you can have multiple recordings going at the same time)
- STOP - sends a "stop recording" signal to the agent screen  
(this will stop all active recordings on the agent screen)
- STATUS - displays results of active recording and agent session information  
(returns: user|recording\_id|filename|server|start\_time|agent\_server|session|agent\_status)
- stage - OPTIONAL, value to append to the recording filename, limited to 14 characters, if more it will truncate. Only works with START value

### Example URL:

```
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=START
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=STOP
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=STATUS
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=START&stage=_MIDCALL
```

### Example responses:

```
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: stop recording error - 6666|||||192.168.1.5|8600051|PAUSED
SUCCESS: recording function sent - 6666|STOP|||||192.168.1.5|8600051|PAUSED
SUCCESS: recording function sent - 6666|START|||||192.168.1.5|8600051|PAUSED
SUCCESS: recording function sent - 6666|START_MIDCALL|||||192.168.1.5|8600051|PAUSED
NOTICE: not recording - 6666|||||192.168.1.5|8600051|PAUSED
NOTICE: recording active - 6666|121242|20120810-012008__6666_|192.168.1.5|2012-08-10 01:20:10|192.168.1.5|
8600051|PAUSED
```

## webphone\_url

display or launch the webphone url for the current agent's session

### Values:

- (value)
- value - REQUIRED, choices are below:
- DISPLAY - displays only the URL for the webphone if enabled
- LAUNCH - redirects the url to the webphone url to launch it

### Example URL:

```
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=webphone_url&value=DISPLAY
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=webphone_url&value=LAUNCH
```

### Example responses:

<if function is successful, the URL will be displayed or launched>

ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: webphone\_url not valid - 6666|DISPLAY  
ERROR: webphone\_url error - webphone url is empty - 6666  
ERROR: webphone\_url error - no session data - 6666

## call\_agent

send a call to connect the agent to their session

**Values:** (value)  
value - **REQUIRED**, choices are below:  
CALL - places call from the agent session to the agent's phone

NOTES: this function is not designed to work with on-hook agents

### Example URL:

[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=call\\_agent&value=CALL](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=call_agent&value=CALL)

### Example responses:

ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: call\_agent not valid - 6666|CALL  
ERROR: call\_agent error - entry is empty - 6666  
ERROR: call\_agent error - no session data - 6666  
SUCCESS: call\_agent function sent - 6666

## audio\_playback

Basic play/stop/pause/resume/restart audio in agent session

NOTE: PAUSE/RESUME/RESTART features only work with Asterisk 1.8 and higher  
(In Asterisk versions earlier than 1.8 you can replicate RESTART using PLAY and dial\_override=Y)

### **VALUES:**

stage -  
REQUIRED, choices are below:  
PLAY - starts playing of new audio file in agent session  
STOP - kills playback of audio in agent session  
PAUSE - pauses playing of audio  
RESUME - resumes playing of audio after pause  
RESTART - restarts playback at beginning of audio  
value -  
REQUIRED for stage of 'PLAY', name of audio file in audio store to play, must NOT have extension  
dial\_override -  
OPTIONAL, (Y or N), default is N. Allows you to PLAY without issuing a STOP to a currently playing audio file

### EXAMPLE URLS:

[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=audio\\_playback&value=ss-noservice&stage=PLAY](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=audio_playback&value=ss-noservice&stage=PLAY)  
[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=audio\\_playback&stage=STOP](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=audio_playback&stage=STOP)  
[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=audio\\_playback&stage=PAUSE](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=audio_playback&stage=PAUSE)

http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=audio\_playback&stage=RESUME  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=audio\_playback&stage=RESTART  
http://server/agc/api.php?source=test&user=6666&pass=1234&agent\_user=1000&function=audio\_playback&value=ss-  
noservice&stage=PLAY&dial\_override=Y

**RESPONSES:**

ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - PLAY|6666  
ERROR: audio\_playback not valid - ss-noservice|PLAY|6666  
ERROR: audio\_playback error - entry is empty - PLAY|6666  
ERROR: audio\_playback error - no session data - PLAY|6666  
ERROR: audio\_playback error - no audio playing in agent session - 8600051|10.10.10.15|PAUSE|6666  
ERROR: audio\_playback error - audio already playing in agent session - 8600051|10.10.10.15|PLAY|6666  
NOTICE: audio\_playback previous playback stopped - PLAY|Y|6666  
SUCCESS: audio\_playback function sent – ss-noservice|PLAY|6666

## switch\_lead

**DESCRIPTION:**

For agents on a live inbound call, switches lead\_id of live inbound call on agent screen including associated logs. You can define a lead\_id or a vendor\_lead\_code to switch to. Works like the SELECT function of the LEAD SEARCH feature in the agent screen.

**VALUES:**

lead\_id - Any valid lead\_id from the system(either lead\_id or vendor\_lead\_code are required) if both are defined, lead\_id will override vendor\_lead\_code  
vendor\_lead\_code - OPTIONAL, any valid Vendor lead code

**EXAMPLE URLS:**

http://server/agc/api.php?source=test&user=6666&pass=1234&agent\_user=1000&function=switch\_lead&lead\_id=12345  
http://server/agc/api.php?  
source=test&user=6666&pass=1234&agent\_user=1000&function=switch\_lead&vendor\_lead\_code=1234567890

**RESPONSES:**

ERROR: switch\_lead not valid - ||6666  
ERROR: no user found - 6666  
ERROR: agent\_user is not logged in - 6666  
ERROR: agent\_user does not have a live call - 6666  
ERROR: agent call is not inbound - 6666|V2012367890123456789  
ERROR: campaign not found - 6666|TESTCAMP  
ERROR: campaign does not allow inbound lead search - 6666|TESTCAMP  
ERROR: switch-to lead not found - 6666|12345|123456789  
SUCCESS: switch\_lead function set – 6666|12345|1234567890|TESTCAMP|12346

## vm\_message

**IMPORTANT NOTES:**

- Set the campaign "Answering Machine Message" setting to 'LTTagent' for this to work.
- There are some other campaign settings that can override this function, so you will want to disable 'AM Message Wildcards' and 'VM Message Groups'.

**DESCRIPTION:**

Set a custom voicemail message to be played when agent clicks the VM button on the agent screen

**VALUES:**

value -

REQUIRED, One audio file or multiple audio files(separated by pipes) to play when the call is sent to VM by the agent

lead\_id -

OPTIONAL, The lead\_id of the call that the agent is currently on, if populated it will validate that is the lead the agent is talking to

**EXAMPLE URLS:**

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=vm_message&value=EXship01|EXship02|EXship03)

source=test&user=6666&pass=1234&agent\_user=1000&function=vm\_message&value=EXship01|EXship02|EXship03

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=vm_message&lead_id=12345&value=appointment_remi)

source=test&user=6666&pass=1234&agent\_user=1000&function=vm\_message&lead\_id=12345&value=appointment\_remi  
nder2

**RESPONSES:**

ERROR: vm\_message not valid - ||6666

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

ERROR: current call does not match lead\_id submitted - 6666

ERROR: agent\_user does not have a live call - 6666

SUCCESS: vm\_message function set - 6666|12345|EXship01|EXship02|EXship03

## pause\_code

**DESCRIPTION:**

set a pause code for an agent that is paused

**VALUES:**

value - pause code to set, must be 6 characters or less

**NOTES:**

this function will not work if the agent is not paused

**EXAMPLE URLS:**

[http://server/agc/api.php?source=test&user=6666&pass=1234&agent\\_user=1000&function=pause\\_code&value=BREAK](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=pause_code&value=BREAK)

**RESPONSES:**

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

ERROR: pause\_code not valid - 6666|JUMPING

ERROR: pause\_code error - agent is not paused - 6666

SUCCESS: pause\_code function sent - 6666

## calls\_in\_queue\_count

**DESCRIPTION:**

display a count of the calls waiting in queue for the specific agent

**VALUES:**

value - REQUIRED, choices are below:

DISPLAY - displays number of calls in queue that could be sent to this agent

**EXAMPLE URLS:**

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=calls\_in\_queue\_count&value=DISPLAY

**RESPONSES:**

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

SUCCESS: calls\_in\_queue\_count – 0

## force\_fronter\_leave\_3way

**DESCRIPTION:**

will send a command to fronter agent to leave-3way call that executing agent is on. Will not execute command for the named 'agent\_user', but will look for oldest other user currently on a call with the same lead\_id that the named agent\_user is on the phone with.

**VALUES:**

value - REQUIRED, choices are below:

LOCAL\_ONLY - looks for fronter only on local cluster

LOCAL\_AND\_CCC - looks on local cluster and remote CCC to send command to (will always check local first)

CCC\_REMOTE - use this when the closer is not on this cluster

lead\_id - OPTIONAL, only to be used with CCC\_REMOTE value commands

**EXAMPLE URLS:**

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=force\_fronter\_leave\_3way&value=LOCAL\_ONLY

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=force\_fronter\_leave\_3way&value=LOCAL\_AND\_CCC

**RESPONSES:**

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

ERROR: agent\_user is not on a phone call - 6666

ERROR: no fronter found - 6666

SUCCESS: force\_fronter\_leave\_3way SENT - 6667

SUCCESS: force\_fronter\_leave\_3way command sent over CCC – test\_ccc

## force\_fronter\_audio\_stop

**DESCRIPTION:**

will send a command to fronter agent session to stop any audio\_playback playing on it. Will not execute command for the named 'agent\_user', but will look for other user session currently on a call with the same lead\_id that the named agent\_user is on the phone with.

**VALUES:**

value - REQUIRED, choices are below:

LOCAL\_ONLY - looks for fronter only on local cluster

LOCAL\_AND\_CCC - looks on local cluster and remote CCC to send command to (will always check local first)

CCC\_REMOTE - use this when the closer is not on this cluster

lead\_id - OPTIONAL, only to be used with CCC\_REMOTE value commands



**EXAMPLE URLS:**

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=force\_fronter\_audio\_stop&value=LOCAL\_ONLY

http://server/agc/api.php?

source=test&user=6666&pass=1234&agent\_user=1000&function=force\_fronter\_audio\_stop&value=LOCAL\_AND\_CCC

**RESPONSES:**

ERROR: force\_fronter\_audio\_stop not valid - LOCAL\_AND\_CCC|6666

ERROR: auth USER DOES NOT HAVE PERMISSION TO USE THIS FUNCTION - LOCAL\_AND\_CCC|6666|

force\_fronter\_audio\_stop

ERROR: no user found - 6666

ERROR: agent\_user is not logged in - 6666

ERROR: agent\_user is not on a phone call - 6666

ERROR: no fronter session found - |6666|1234

ERROR: no fronter found - 6666

ERROR: force\_fronter\_audio\_stop error - no audio playing in other agent session - 8600051|10.0.0.5||6666|1234

SUCCESS: force\_fronter\_audio\_stop function SENT - LOCAL\_AND\_CCC||6667|1234

SUCCESS: force\_fronter\_audio\_stop command sent over CCC - test\_ccc

**Other information:**

Example MySQL query options for executing API functions(not available for all functions):

update dialer \_live\_agents set external\_hangup=1 where user='1000';

update dialer \_live\_agents set external\_status='A' where user='1000';

## AGI scripting

(Asterisk Gateway Interface) In Dialer AGI scripts are designed to allow application level control of selected features, and increasing their existing level of functionality.

### agent\_monitor.agi

NOTE! - To use this script you MUST have entries in the System Settings "Custom Dialplan Entry" for this to work.  
Read the AGENT\_MONITOR.txt document for more information.

This script is designed to allow managers to listen to agent sessions by dialing a phone exten number or user ID number. For this to work, the user ID or phone extension must be only digits. If you are using the phone extension, then all phone extensions on the system must be unique. user is prompted for a user ID or phone login then press then the user is forwarded to monitor the active dialer agent session.

#### settings:

1. USER, PHONE, PLOGIN, REDIRECT or RANDOM, lookup by user id, phone extension or phone login (default is USER)
2. Y or N, log in api log (default is N)
3. BARGE or LISTEN, (default is LISTEN)
4. Prepopulated ID, for use in context by itself
5. Campaign limits, double-dash-delimited, i.e. "TEST--TEST2", (default is disabled)
6. Y or N, play user IDs to listen to (default is N)

can be added as an AGI to a Call Menu, or just a direct extension transfer:

#### Call menu AGI with options:

agent\_monitor.agi,USER---N---LISTEN-----TEST--TEST2---N

or as extension transfer to "up\_monitor" context and "s" extension

### agi-AGENT\_dial\_in.agi

This script is designed to allow agents the ability to dial in to an extension to establish the phone connection to their DIALER session. The user login and password must be only digits and nothing but digits to use this utility.

user is prompted for their user ID then press #  
user is prompted for their passcode then press #  
then the user is forwarded to the active dialer agent session

#### settings:

1. allow user\_id only login (disabled by default)  
Y - allow user ID only with no password

- CONTACTS - lookup the user ID as the 'office\_num' field in the contact\_information table  
 N or (blank) - require password (default)
2. forward to A or B within Call Menu instead of logging into an agent session  
 Y - forward to A option on valid user ID or B option on invalid user ID  
 N or (blank) - go to agent session (default)

can be added as an AGI to a Call Menu, or as below:

```
agent dial-in:
exten => 2345,1,Answer          ; Answer the line
exten => 2345,2,AGI(agi-AGENT_dial_in.agi)
exten => 2345,3,Hangup
```

Call menu with options:

```
agi-AGENT_dial_in.agi,Y---Y
```

## agi-AGENT\_route.agi version 2.6

For use with a Call Menu in the custom dialplan section or as an AGI route.

### Settings:

1. DID pattern to use for In-group initiation settings ('default' is default)
2. the agentdirect in-group to send the calls to ('AGENTDIRECT' is default)
3. transfer only to ACTIVE in the system agent or dialer LOGGED\_IN agent ('ACTIVE' is default)
4. prompt for user ID, if this is filled in with a filename it will ask, otherwise it will assume \$extension is the user ID
5. number of digits required for user ID validation, X will allow anything, this will only be enforced if "prompt for user ID" prompt is populated
6. audio filename for invalid selection, agent not available ('invalid' is default)
7. audio filename for invalid user id re-enter prompt, agent not available
8. number of retry attempts to enter a valid user ID this will only be enforced if "prompt for user ID" prompt is populated
9. in-group to send the call to if there is no valid agent, if none is defined, then the call will be directed to 's' exten
10. audio filename before sending call to no-agent route
11. audio filename before sending call to no-agent route if agent active but not logged-in to dialer

Example in CallMenu AGI route with all options:

```
"agi-AGENT_route.agi,default---AGENTDIRECT---LOGGED_IN---if-u-know-ext-dial---X---
invalid---please-try-again---3---TEST_IN3---pbxtransfer---outside-transfer"
```

Example with 4-digit agent Ids:

```
# exten => _XXXX,1,AGI(agi-AGENT_route.agi,default---AGENTDIRECT---ACTIVE)
```

## agi-CALLCARD\_dial\_in.agi

This script is designed to allow customers the ability to dial in to a DID and enter in a PIN number that would look up their account and send on to a specified in-group if pin is valid. The user is prompted

for their PIN number only (no pound '#' required), then the user is forwarded to the active dialer agent session.

Can be added as an AGI to a Call Menu, or as below:

Call Menu Entry:

```
"agi-CALLCARD_dial_in.agi,en---3---callcard_pin_enter---callcard_pin_invalid---default"
```

Agent dial-in:

```
exten => 2346,1,Answer ; Answer the line
exten => 2346,2,AGI(agi-CALLCARD_dial_in.agi,en---3---callcard_pin_enter---
callcard_pin_invalid---default)
exten => 2346,3,Hangup
```

Below are the parameters needed for the script to be run properly

1. language
  - en - English <default>
  - es - Spanish
  - fr - French, not fully supported
2. maximum attempts before hangup:
  - 3 <default>
3. audio file enter pin number prompt:
  - callcard\_pin\_enter <default>
4. audio file invalid pin number prompt:
  - callcard\_pin\_invalid <default>
5. DID pattern to use for in-group forwarding settings:
  - default <default>
  - USE-ORIGINATING-DID - this option will look up the DID the customer dialed in on and use those settings

Other audio files used:

- pin-number-accepted
- vm-youhave
- callcard\_minutes\_left

## **agi-CANADA\_PRI\_CIDname.agi version**

Runs after call goes through IAX loop to send out custom CallerIDname on Canadian PRIs that allow dynamic setting of CIDname with call initiation

You need to have lines similar to those below in your extensions.conf file:

Outbound DIALER calls:

```
exten => _91NXXNXXXXXXXX,1,AGI(call_log.agi,${EXTEN})
exten => _91NXXNXXXXXXXX,2,AGI(agi-CANADA_PRI_CIDname.agi,${EXTEN})
exten => _91NXXNXXXXXXXX,3,Dial(${TRUNKX}/${EXTEN:1},55,tTo)
exten => _91NXXNXXXXXXXX,4,Hangup
```

## agi-DID\_route.agi

Runs when a call comes into an inbound context on a trunk. This script will send the calls to various places depending on the settings for each DID. You will need to put a line similar to this below in your extensions.conf file in the context for where incoming calls go from your trunks (for example, the trunkinbound context which is present in the default dialplan):

```
[trunkinbound]
inbound DID catch-all:
exten => _X.,1,AGI(agi-DID_route.agi)
```

## agi-dtmf.agi

Script for playing DTMF tones or signals received as the callerid field. DTMF sound files must be in /var/lib/asterisk/sounds for this to work

Accepted values are: 1 2 3 4 5 6 7 8 9 0 # \* ,  
comma means pause for 1 second

Also, you can send letters that will be translated into their proper dialpad number counterpart, for example, "SMITH" would be converted into "76484" and those DTMF signals would be sent out.

```
exten => 8500998,1,Answer
exten => 8500998,2,Playback(silence)
exten => 8500998,3,AGI(agi-dtmf.agi)
exten => 8500998,3,AGI(agi-dtmf.agi,signalonly) ; optional signal only DTMF
exten => 8500998,4,Hangup
```

## agi-IVR\_recording\_verification.agi

This script is designed to function as a complete automated 3rd party verification IVR recording system. This script will work by optionally asking for a company ID and/or a customer phone number, then it will play through the listed prompts asking for a single digit press (i.e. 1 for a yes or a 3 for a no, hash/pound/star/zero/0 are not accepted only 1-9 is valid for these steps). All data for these calls will be logged to the dialer \_ivr table as well as optionally to a log file in the standard astguiclient log file directory and/or STDERR output on the asterisk process. This script uses the /etc/astguiclient.conf file for database connection settings, logging data and for logfile path information only. With a modified VDAD agi transfer script, this script could also be used to do automated outbound surveys as well. Feature under development.

1. the DNIS or inbound number called
2. play the recording ID (Y|N) with prompt leading up to it
3. record this call(Y|N)
4. ask for a company code(Y|N) with the number of digits in that company code and the prompt
5. ask for a user code(Y|N) with the number of digits in that user code and the prompt
6. ask for the customer phone number(Y|N) with the number of digits in that phone number and the prompt (Y-10-85100001)
7. speak the current date (Y|N) with prompt announcing the date
8. a dash-delimited list of prompts that expect responses(85100002-85100003)

- 9. a "your recording ID is..." prompt (85100004)
- 10. logging/output (FILE|STDERR|BOTH|NONE)

Inbound IVR call:

```
exten => 1234,1, Ringing      ; call ringing
exten => 1234,2, Wait(1)     ; Wait 1 second for CID delivery from PRI
exten => 1234,3, Answer      ; Answer the line
exten => 1234,4, AGI(agi-IVR_recording_verification.agi,7274506620---Y-85100004---Y---Y-1-85100016---N---N---Y-85100007---85100009-600--85100012-30--85100013---85100004---BOTH)
exten => 1234,5, Hangup
```

Inbound IVR call from a DIALER transfer:

```
exten => _83002*.,1, Ringing      ; call ringing
exten => _83002*.,2, Wait(1)     ; Wait 1 second for CID delivery
exten => _83002*.,3, Answer      ; Answer the line
exten => _83002*.,4, AGI(agi-IVR_recording_verification.agi,7275551234---N---Y---N---N---Y-10-85100001---N---85100002-85100003---85100004---BOTH)
exten => _83002*.,5, Hangup
```

**agi-LCR-Route.agi**

This script looks up the NPANXX in the lcr table and sets the LCRTRUNK dialplan variable to the carrier string with the cheapest rate. If no carrier is found for this NPANXX the variable is unchanged so you should set it with the default previously.

```
[globals]
LCRTRUNK=SIP/provider1 ; default LCR trunk
```

```
[default]
```

Outbound DIALER calls:

```
exten => _91NXXNXXXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXXXX,n,AGI(agi-LCR-Route.agi,${EXTEN:2:6})
exten => _91NXXNXXXXXXXX,n,Dial(${LCRTRUNK}/${EXTEN:2:},,To)
exten => _91NXXNXXXXXXXX,n, Hangup
```

Here is the SQL to create the lcr table:

```
create table if not exists lcr (
    npanxx mediumint not null,
    rate varchar(10) not null,
    carrier_string varchar(20) not null
);
alter table lcr add unique index (npanxx, rate, carrier_string);
```

A typical npanxx from this table should look like:

```
mysql> select npanxx,rate,carrier_string from lcr where npanxx='734223';
```

```

+-----+-----+-----+
| npanxx | rate | carrier_string |
+-----+-----+-----+
| 734223 | 0.0064 | SIP/provider1 |
| 734223 | 0.0076 | SIP/provider2 |
+-----+-----+-----+

```

Unfortunately these rate sheets are not in a standard format. You will have to write a custom loading script to populate this table. An example loading script is provided in the extras directory of the astguiclient source code called lcr\_loader\_example.pl

## agi-NVA\_recording.agi

This script is designed to give recording ability to agents not the using Dialer agent screen.

1. logging output (NONE|STDERR|FILE|BOTH)
2. the Dialer user ID, if empty it defaults to accountcode(usually phone extension) or dialer\_live\_agents user who launched the call
3. log this call in user\_call\_log (Y|N) default N
4. log this call in call\_log (Y|N) default N, ONLY NEEDED FOR INBOUND AND INTERSYSTEM CALLS!!!
5. audio record this call (Y|N) default N
6. double-log this call in call\_log (Y|N) default N, ONLY NEEDED FOR INBOUND CALLMENU FORWARDED CALLS!!!
7. play the recording ID of this call before recording starts
8. include the recording ID in the filename
9. search dialer\_list for phone number dialed (Y|N) default N, assumes 10 digit phone numbers
10. if 9 is Y, this is search method (ALLLISTS|PHONE) default ALLLISTS, search all lists, use phone setting, CURRENTLY DOES NOTHING
11. error out and end call if phone number is not found (Y|N) default N
12. run the phone entry's NVA Call URL (Y|N) default N
13. if 9 is Y, and phone number is not found, insert into phone's NVA List ID (Y|N) default N
14. if 13 is Y, override phone's NVA List ID with this list ID when lead is inserted
15. if 13 is Y, override phone's NVA Phone Code with this phone code when lead is inserted
16. if 13 is Y, override phone's NVA Status with this status when lead is inserted

Custom dialplan entry example: (similar to the defaultlog Call Menu)

```

exten => _X.,1,AGI(agi-NVA_recording.agi,BOTH-----Y---N---Y --N)
exten => _X.,n,Goto(default,${EXTEN},1)
exten => _X.,n,Hangup

```

Inbound to agent example:

```

exten => 5678,1,AGI(agi-NVA_recording.agi,BOTH-----Y---Y---Y -- N)
exten => 5678,n,Goto(dialer -auto,5678,1)
exten => 5678,n,Hangup

```

Example of dial prefix of 94 in System Settings Custom Dialplan to default log:

```

exten => _941NXXNXXXXXXXX,1,Goto(defaultlog,9${EXTEN:2},1)

```

example of using as Call Menu prompt to record with playing of recording id

```
agi-NVA_recording.agi,BOTH-----Y---N---Y---N---Y---Y
```

example of using as Call Menu prompt to record, search for phone number, run NVA call URL and error if not found

```
agi-NVA_recording.agi,BOTH-----Y---N---Y---N---N---Y---ALLLISTS---Y---Y
```

custom dialplan entry example: (similar to the defaultlog Call Menu) with NVA options

```
exten => _X.,1,AGI(agi-NVA_recording.agi,BOTH-----Y---N---Y---N---N---Y---ALLLISTS---N---Y---Y)
```

```
exten => _X.,n,Goto(default,${EXTEN},1)
```

```
exten => _X.,n,Hangup
```

## agi-phone\_monitor.agi

NOTE! - To use this script you MUST have entries in the System Settings

"Custom Dialplan Entry" for this to work.

Read the AGENT\_MONITOR.txt document for more information.

This script is designed to allow managers to listen to agent sessions by dialing a phone exten number or user ID number. For this to work, the user ID or phone extension must be only digits. If you are using the phone extension, then all phone extensions on the system must be unique.

user is prompted for a user ID or phone login then press #

then the user is forwarded to monitor the active dialer agent session

### Settings:

1. USER, PHONE or PLOGIN, lookup by user id, phone extension or phone login (default is USER)
2. Y or N, log in api log (default is N)
3. BARGE or LISTEN, (default is LISTEN)
4. Prepopulated ID, for use in context by itself

Can be added as an AGI to a Call Menu, or just a direct extension transfer:

call menu AGI with options:

```
agi-phone_monitor.agi,USER---N---LISTEN---
```

or as extension transfer to "up\_monitor\_exit" context and "s" extension

NOTE: When using the agi-phone\_monitor script for agent monitoring, the following dialplan lines need to be added (where the original dialplan additions were placed) for this to work: (shown in context in the 2.6 upgrade instructions below)

```
; quiet entry, listen-only, exit-on-dtmf conferences for DIALER (listen)
```

```
exten => _588600XXX,1,Dial(${TRUNKblind}/56${EXTEN:2},55)
```

```
exten => _588600XXX,n,Hangup()
```

```
; barge, exit-on-dtmf conferences for DIALER (barge)
```



```
exten => _598600XXX,1,Dial(${TRUNKblind}/57${EXTEN:2},55)
exten => _598600XXX,n,Hangup()
```

## agi-record\_prompts.agi

For recording prompts to GSM file over the phone. Saves recordings with 8-digit filenames to be played when exten is dialed. Prompts for recording AGI script, ID is 4321

first variable is format (gsm/wav)

second variable is timeout in milliseconds (default is 360000 [6 minutes])

```
exten => 8167,1,Answer
exten => 8167,2,AGI(agi-record_prompts.agi,wav----- 360000)
exten => 8167,3,Hangup
exten => 8168,1,Answer
exten => 8168,2,AGI(agi-record_prompts.agi,gsm----- 360000)
exten => 8168,3,Hangup
```

### Playback of recorded prompts:

```
exten => _851XXXXXX,1,Answer
exten => _851XXXXXX,2,Playback(${EXTEN})
exten => _851XXXXXX,3,Hangup
```

### GSM Sound Files used:

- ld\_welcome\_pin\_number
- ld\_invalid\_pin\_number
- vm-rec-generic
- auth-thankyou
- vm-review
- vm-msgsaved
- vm-goodbye

## agi-set\_variables.agi

Runs after a call\_log before call is placed out the trunk and sets all dialer \_list fields as variables for the call. You need to put lines similar to those below in your extensions.conf file:

### DIALER auto dialer transfer script AMD with Load Balanced:

```
exten => _91NXXNXXXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXXXX,n,AGI(agi-set_variables.agi)
exten => _91NXXNXXXXXXXX,n,Dial(${TESTSIPTRUNK}/${EXTEN:2},,rTor)
exten => _91NXXNXXXXXXXX,n,Hangup
```

## agi-VDAD\_ALL\_inbound.agi

Runs when a call comes in from an inbound call. This script will send the calls out to the closers that are logged in.

THIS SCRIPT CONSOLIDATES THIRTEEN SEPARATE VDAD closer inbound SCRIPTS

The parameters below are handled automatically by DID or Call Menu settings and do not need to be manually set in the dialplan.

Below are the parameters needed for the script to be run properly

1. the method of call handling for the script:

- CID - CID received, add record with phone number
  - CIDLOOKUP - Lookup CID to find record in whole system
  - CIDLOOKUPRL - Restrict lookup to one list
  - CIDLOOKUPRC - Restrict lookup to one campaign's lists
  - CIDLOOKUPALT - Lookup CID to find record in whole system by phone number  
then alt\_phone
  - CIDLOOKUPRLALT - Restrict lookup to one list by phone number then alt\_phone
  - CIDLOOKUPRCALT - Restrict lookup to one campaign's lists by phone number then  
alt\_phone
  - CIDLOOKUPADDR3 - Lookup CID to find record in whole system by phone number  
then address3
  - CIDLOOKUPRLADDR3 - Restrict lookup to one list by phone number then address3
  - CIDLOOKUPRCADDR3 - Restrict lookup to one campaign's lists by phone number then  
address3
  - CIDLOOKUPALTADDR3 - Lookup CID to find record in whole system by phone  
number then alt\_phone then address3
  - CIDLOOKUPRLALTADDR3 - Restrict lookup to one list by phone number then  
alt\_phone then address3
  - CIDLOOKUPRCALTADDR3 - Restrict lookup to one campaign's lists by phone number  
alt\_phone then address3 then address3
  - CLOSER - Closer calls from DIALER frontends (and previous in-group calls)
  - ANI - ANI received, add record with phone number (based on RBS T1s)
  - ANILOOKUP - Lookup ANI to find record in whole system
  - ANILOOKUPRL - Restrict lookup to one list
  - ANILOOKUPRC - Restrict lookup to one campaign's lists
  - VID - Add record with Vendor Lead Code received as argument 12
  - VIDLOOKUP - Lookup Vendor Lead Code received as argument 12 to find record in  
whole system
  - VIDLOOKUPRL - Restrict lookup to one list (argument 12)
  - VIDLOOKUPRC - Restrict lookup to one campaign's lists (argument 12)
  - VIDPROMPT - Prompt Vendor Lead Code to User with IVR to add record with Vendor  
Lead Code
  - VIDPROMPTLOOKUP - Prompt Vendor Lead Code to User with IVR to find record in  
whole system
  - VIDPROMPTLOOKUPRL - Restrict lookup to one list
  - VIDPROMPTLOOKUPRC - Restrict lookup to one campaign's lists
  - 3DIGITID - Enter 3 digit code to go to agent
  - 4DIGITID - Enter 4 digit code to go to agent
  - XDIGITID - Enter X digit code to go to agent (variable, i.e. 9DIGITID, 12DIGITID,  
etc...)
2. the method of searching for an available agent:
- LO - Load Balance Overflow only (priority to home server)
  - LB - <default> Load Balance total system

- SO - Home server only

3. the full name of the IN GROUP to be used in dialer for the inbound call
4. the phone number that was called, for the log entry
5. the callerID or lead\_id of the person that called(usually overridden)
6. the park extension audio file name if used
7. the status of the call initially(usually not used)
8. the list\_id to insert the new lead under if it is new (and CID/ANI available)
9. the phone dialing code to insert with the new lead if new (and CID/ANI available)
10. the campaign\_id to search within lists if CIDLOOKUPRC
11. the user to queue the call to for AGENTDIRECT in-group calls
12. vendor\_lead\_code if external mechanism like custom IVR is used to prompt user for ID  
you can also set the vendor\_lead\_code variable instead if you are using VIDPROMPT
13. VID enter prompt filename to play if method is set to a VID\* option
14. VID you-have-entered filename to play if method is set to a VID\* option
15. VID confirm prompt filename to play if method is set to a VID\* option
16. VID digit length validation to use if method is set to a VID\* option, set to empty or X to disable

Inbound DIALER calls:

```
exten => 1234,1,Answer ; Answer the line
exten => 1234,2,AGI(agi-VDAD_ALL_inbound.agi,CID----LB----INB----7274515134----
Closer----park-----999-----1 ---- OUTB)
exten => 1234,3,Hangup
```

Inbound with removal of first digit of callerID on all calls:

```
exten => 1234,1,Answer ; Answer the line
exten => 1234,n,set(CALLERID(num)=${ CALLERID(num):1 })
exten => 1234,n,AGI(agi-VDAD_ALL_inbound.agi,CID----LB----INB----7274515134----
Closer----park-----999-----1 ---- OUTB)
exten => 1234,n,Hangup
```

Inbound DIALER transfer calls [can arrive through PRI T1 crossover, IAX or SIP channel]

```
exten => _90009.,1,Answer ; Answer the line
exten => _90009.,2,AGI(agi-VDAD_ALL_inbound.agi,CLOSER----LB----CL_TESTCAMP----
7275551212----Closer----park-----999----- 1)
exten => _90009.,3,Hangup
exten => _990009.,1,Answer ; Answer the line
exten => _990009.,2,AGI(agi-VDAD_ALL_inbound.agi,CLOSER----LB----CL_TESTCAMP----
7275551212----Closer----park-----999----- 1)
exten => _990009.,3,Hangup
```

DID forwarded calls:

```
exten => _99909*.,1,Answer
exten => _99909*.,2,AGI(agi-VDAD_ALL_inbound.agi)
exten => _99909*.,3,Hangup
```

## **agi-VDAD\_ALL\_outbound.agi**

runs when an outbound call is answered. This script will send the calls out to the agents that are logged

in.

## THIS SCRIPT CONSOLIDATES EIGHT SEPARATE VDAD outbound transfer SCRIPTS

You need to put lines similar to those below in your extensions.conf file:

Below are the parameters needed for the script to be run properly

1. the method of call handling for the script:

- NORMAL - <default> Standard outbound routing to agent
- TEST - For performance testing only
- BROADCAST - For no-agent broadcast dialing
- SURVEY - For survey question then on to agent
- SURVEYCAMP - For survey question using campaign settings
- SURVEYCAMPCEP - Survey question, campaign settings, cepstral name
- REMINDER - Reminder campaign
- REMINDX - Reminder with transfer to agent

2. the method of searching for an available agent: (agent\_search\_method)

- LB - <default> Load Balance total system
- LO - Load Balance Overflow only (priority to home server)
- SO - Home server only

3. The Connected Line Name to solve CID Name change issues.

4. the sound file to play when doing a SURVEY, REMINDER, REMINDX campaign

5. the acceptable dtmf digits for a SURVEY

6. the out-opt digit for a SURVEY (must be in the digit map)

7. the sound file to play for a SURVEY when transferring to an agent

8. the sound file to play for a SURVEY when DNCing the call

9. OPTIN or OPTOUT: if OPTIN call is only sent to agent with button press  
if OPTOUT call is sent to agent if no button press at all

10. the status that is use for a SURVEY when someone opts out  
if the status is DNC it will also add them to the internal dnc table

### Outbound DIALER calls:

```
exten => 8368,1,AGI(agi://127.0.0.1:4577/call_log)
exten => 8368,2,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB-----$
{CONNECTEDLINE(name)})
exten => 8368,3,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB-----$
{CONNECTEDLINE(name)})
exten => 8368,4,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB-----$
{CONNECTEDLINE(name)})
exten => 8368,5,Hangup
```

### Outbound DIALER SURVEY calls:

```
exten => 8366,1,AGI(agi://127.0.0.1:4577/call_log)
exten => 8366,2,AGI(agi-VDAD_ALL_outbound.agi,SURVEY-----LB-----$
{CONNECTEDLINE(name)}-----US_pol_survey_hello-----1238-----8-----US_pol_survey_transfer-----
US_thanks_no_contact-----OPTOUT ---- DNC)
exten => 8366,3,AGI(agi-VDAD_ALL_outbound.agi,SURVEY-----LB-----$
{CONNECTEDLINE(name)}-----US_pol_survey_hello-----1238-----8-----US_pol_survey_transfer-----
US_thanks_no_contact-----OPTOUT ---- DNC)
exten => 8366,4,AGI(agi-VDAD_ALL_outbound.agi,SURVEY-----LB-----$
```

```
{CONNECTEDLINE(name)}-----US_pol_survey_hello-----1238-----8-----US_pol_survey_transfer-----
US_thanks_no_contact-----OPTOUT ---- DNC)
exten => 8366,5,Hangup
```

## **agi-VDAD\_inbound\_calltime\_check.agi**

Runs when a call comes in from an inbound call. This script will check the # settings of the defined calltime scheme in DIALER and either send the call to the after-hours method for the defined IN-GROUP or exit to let the call continue. This script is also used by Call Menus.

You need to put lines similar to those below in your extensions.conf file:

Below are the parameters needed for the script to be run properly

1. the in-group to take settings from
2. whether to log the call into the dialer \_auto\_calls table:
  - YES - insert the call as status IVR
  - NO - do not insert call into vac table
3. note to put in the comment\_b field when record inserted into the live\_inbound\_log table, no spaces in this field, use underscore '\_' default if not populated is NONE
4. call time scheme override
5. call route after hours override
6. call route value after hours override
7. call route context after hours override
8. dialer \_list query qualification (YES/NO, default is NO)
  - \* only works with lead\_id-populated calleridname phone calls.
  - This option allows you to specify a SQL fragment used to do a count(\*) against the dialer \_list table for the lead and other field values
  - This feature will look for the qualify\_sql in the call menu record
9. play sip-silence audio, YES/NO, default is YES

Inbound calls check calltime:

```
exten => 1234,1,Answer ; Answer the line
exten => 1234,2,AGI(agi-VDAD_inbound_calltime_check.agi,INBOUND-----YES-----START-----
24hours-----EXTENSION-----101-----default-----NO----- YES)
exten => 1234,3,Hangup
```

## **agi-VDAD\_pin\_IVR.agi**

At the end of a call, the agent transfers customer to this script. This script plays a beep then plays the first portion of the message then logs the portion as listened to in the dialer \_list\_pins table then plays second portion and hangs up.

IN THE CAMPAIGN OR IN-GROUP NUMBER PRESET FIELD:

AXFER83209

ON THE SERVER ORIGINATING THE CALL:

outbound IVR play DIALER calls:

```
exten => _983209.,1,AGI(call_log.agi,${EXTEN})
exten => _983209.,2,Dial(${TRUNKY}/${EXTEN:1},60)
exten => _983209.,3,Hangup
```

#### ON THE SERVER THAT HAS THIS SCRIPT:

inbound IVR play DIALER calls:

```
exten => _83209.,1,Answer
exten => _83209.,2,AGI(agi-VDAD_pin_IVR.agi,${EXTEN})
exten => _83209.,3,Hangup
```

### **agi-VDAD\_RINGALL.agi**

This script is used for on-hook agents to be connected to customer calls when they answer their ringing phones

In the default dialplan context, this is set to the following:

these are used for the ring\_all function in DIALER

```
exten => _8331*.,1,Playback(sip-silence)
exten => _8331*.,n,AGI(agi-VDAD_RINGALL.agi,${EXTEN})
exten => _8331*.,n,AGI(agi-VDAD_RINGALL.agi,${EXTEN})
exten => _8331*.,n,Hangup
```

### **agi-VDADautoREMINDER.agi**

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

Runs when a call comes in from the DIALER auto\_dialer. This script will send the calls out to specified voicemail boxes in if called person presses key. The voicemail box is defined per-lead in the dialer\_list.security\_phrase field. This campaign does not send calls to live agents.

Call statuses from this script:

- N- Call was picked up, didn't finish initial message
- MP- Initial message was played
- VM- call was sent to voicemail
- CALLBK- customer selected to be called back

It is recommended that you run this campaign at a dial level of 1.0

It is recommended that you use remote\_agents for activation of this script

You need to put lines similar to those below in your extensions.conf file:

DIALER \_auto\_dialer transfer script:

```
exten => 8372,1,AGI(call_log.agi,${EXTEN})
exten => 8372,2,AGI(agi-VDADautoREMINDER.agi,${EXTEN})
```

## **agi-VDADautoREMINDERxfer.agi**

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

Runs when a call comes in from the DIALER auto\_dialer. This script will send the calls out to specified voicemail boxes or specified extensions if called person presses specified key(1,2,3). The voicemail box is defined per-lead in the dialer \_list.security\_phrase field. The exten xfer number is defined per-lead in the dialer \_list.comments field

### Call statuses from this script:

- N- Call was picked up, didn't finish initial message
- MP- Initial message was played
- VM- call was sent to voicemail
- XFER- call was sent to specified extension
- CALLBK- customer selected to be called back

It is recommended that you run this campaign at a dial level of 1.0

It is recommended that you use remote\_agents for activation of this script

You need to put lines similar to those below in your extensions.conf file:

### DIALER auto\_dialer transfer script:

```
exten => 8372,1,AGI(call_log.agi,${EXTEN})
```

```
exten => 8372,2,AGI(agi-VDADautoREMINDERxfer.agi,${EXTEN})
```

## **agi-VDADfixCXFER.agi**

Runs when a Consultative transfer is released by the dialer fronter as the call arrives on another channel so that the dialer \_live\_agents record is updated to be accurate.

You need to put lines similar to those below in your extensions.conf file:

DIALER Consultative Xfer fix script:

```
exten => _8600XXX*,1,AGI(agi-VDADfixCXFER.agi)
```

```
exten => _010*010*010*015*8600XXX*,1,AGI(agi-VDADfixCXFER.agi)
```

## **agi-VDADinbound\_NI\_DNC\_CIDlookup.agi**

NOTE: we now recommend using the cm\_dnc.agi script in a Call Menu instead of this script

Runs when a call comes in from an inbound call. This script will play a message and take input to automatically change customer lead to NI or DNC.

\*\*\* This version detects inbound callerID over PRI \*\*\*

### Flag Options:

- 1- default to insert into the dialer \_dnc table for DNC selections (Default=YES)
- 2- campaign to take dnc settings from(overrides option 1)

inbound call from outbound CID callbacks from DIALER calls:

```
exten => 1234,1,Ringing ; call ringing
```

```
exten => 1234,2,Wait(1) ; Wait 1 second for CID delivery from PRI
exten => 1234,3,Answer ; Answer the line
exten => 1234,4,AGI(agi-VDADinbound_NI_DNC_CIDlookup.agi,YES -----TESTCAMP)
exten => 1234,5,Hangup
```

## **agi-VDADlisten\_DTMF.agi**

To be initiated by an agent so during a call. Agent will click a PIN NUMBER link on a web form webpage that will Originate a new call to this script. This script plays a beep and waits for entry of 4 digits then inserts record

**THIS SCRIPT ONLY WORKS WITH A CROSSOVER T1 CABLE FROM ONE T1 PORT TO ANOTHER T1 PORT WHETHER ON THE SAME SERVER OR DIFFERENT ONE**

### IN THE CAMPAIGN OR IN-GROUP NUMBER PRESET FIELD:

AXFER83009

### ON THE SERVER ORIGINATING THE CALL:

outbound DTMF DIALER calls:

```
exten => _983009.,1,AGI(call_log.agi,${EXTEN})
exten => _983009.,2,Dial(${TRUNKY}/${EXTEN:1},60)
exten => _983009.,3,Hangup
```

### ON THE SERVER THAT HAS THIS SCRIPT:

inbound DTMF DIALER calls:

```
exten => _83009.,1,AGI(agi-VDADlisten_DTMF.agi,${EXTEN})
exten => _83009.,2,Hangup
```

## **agi-VDADselective\_CID.agi**

NOTE: EXPERIMENTAL

Runs before a call is placed outbound to filter outgoing callerIDnumber.

You need to put lines similar to those below in your extensions.conf file:

### Outbound DIALER calls:

```
exten => _91NXXNXXXXXXXX,1,AGI(call_log.agi,${EXTEN})
exten => _91NXXNXXXXXXXX,2,AGI(agi-VDADselective_CID.agi,${EXTEN})
exten => _91NXXNXXXXXXXX,3,Dial(${TRUNKX}/${EXTEN:1},55,tTo)
exten => _91NXXNXXXXXXXX,4,Hangup
```

## **agi-VDADselective\_CID\_hangup.agi**

NOTE: EXPERIMENTAL

Will hangup a call if it is not within the specified area codes.

You need to put lines similar to those below in your extensions.conf file:



### outbound DIALER calls:

```
exten => 8352,1,AGI(agi-VDADselective_CID_hangup.agi,${EXTEN})
```

```
exten => 8352,2,Playback(85100001)
```

```
exten => 8352,3,Hangup
```

call\_inbound.agi

Runs at the beginning and ending of every inbound call received.

You need to put lines similar to those below in your extensions.conf file:

parameters for call\_inbound.agi (7 fields separated by five dashes " ---- "):

1. the extension of the phone to ring as defined in the asterisk.phones table

2. the phone number that was called, for the live\_inbound/\_log entry

3. a text description of the number that was called in

4-7. optional fields, they are also passed as fields in the GUI to web browser

### Inbound calls:

```
exten => *_NXXNXXXXXX*3429,3,AGI(call_inbound.agi,spa2000-----8005553429 ---- Inbound  
800-----x-----y-----z---- w)
```

## **agi-VICIrecGateway.agi**

Designed to work on a stand-alone Asterisk server and record calls in stereo. Please read the GATEWAY\_RECORDING\_SERVVER.txt document for more information on this solution.

You need to put lines similar to those below in your extensions.conf file:

You need to put a line similar to this below in your extensions.conf file in the context for where incoming calls go from your trunks (for example, the trunkinbound context which is present in the default dialplan):

[handler]

```
exten => addheader,1,Set(PJSIP_HEADER(add,X-VICIrecGatewayID)=${VICIrecGatewayID})
```

```
exten => addheader,n,Return()
```

[stereo-rec-inbound]

```
exten => _X.,1,Progress()
```

```
exten => _X.,n,Noop(${CALLERID(num)})
```

```
exten => _X.,n,AGI(agi-VICIrecGateway.agi)
```

```
exten => _X.,n,Noop(${CARRIER_FILENAME})
```

```
exten => _X.,n,Noop(${DIALER_FILENAME})
```

```
exten => _X.,n,MixMonitor(r(${CARRIER_FILENAME})t(${DIALER_FILENAME})S)
```

```
exten => _X.,n,Dial(PJSIP/${EXTEN}@pjdial147,,Tob(handler^addheader^1))
```

[stereo-rec-outbound]

```
exten => _X.,1,Progress()
```

```
exten => _X.,n,Noop(${CALLERID(num)})
```

```
exten => _X.,n,AGI(agi-VICIrecGateway.agi)
exten => _X.,n,Noop(${CARRIER_FILENAME})
exten => _X.,n,Noop(${DIALER_FILENAME})
exten => _X.,n,MixMonitor(t(${CARRIER_FILENAME})r(${DIALER_FILENAME})S)
exten => _X.,n,Dial(PJSIP/${EXTEN}@pjsgw1,,To)
```

## call\_inbound.agi

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

runs at the beginning and ending of every inbound call received

You need to put lines similar to those below in your extensions.conf file:

parameters for call\_inbound.agi (7 fields separated by five dashes " ---- "):

1. the extension of the phone to ring as defined in the asterisk.phones table
2. the phone number that was called, for the live\_inbound/\_log entry
3. a text description of the number that was called in
- 4-7. optional fields, they are also passed as fields in the GUI to web browser

Inbound calls:

```
exten => *_NXXNXXXXXX*3429,3,AGI(call_inbound.agi,spa2000-----8005553429 ---- Inbound
800-----x-----y-----z ---- w)
```

## cm.agi

Used by Call Menus to log digit presses if enabled in the settings. You should not need to manually use this script, it is used by the dialplan builder.

You need to put lines similar to those below in your extensions.conf file:

Below are the parameters needed for the script to be run properly

1. the in-group to take settings from
2. digit pressed
3. field(in dialer \_list) to update with DTMF pressed (only if lead\_id populated)

Inbound calls check calltime:

```
exten => 1,1,AGI(cm.agi,INBOUND-----1 ---- province)
exten => 1,2,...
```

To allow for multi-digit entries, put similar entry in the Custom Dialplan Entry:

```
exten => _XXXXX,1,AGI(cm.agi,INBOUND-----${EXTEN} -----postal_code)
exten => _XXXXX,n,Goto(next_callmenu_here,s,1)
```

## cm\_date.agi

Can be used in a call menu prompt to play a date string as defined by the settings below.

Below are the parameters needed for the script to be run properly:

the "SAY DATETIME" parameters for what to say separated by three dashes

1. offset from current epoch in seconds, positive or negative

1 hour is 3600

1 day is 86400

1 week is 604800

30 days is 2592000

1 year is 31536000

2. format of the date to say, i.e. "ABdY":

A: Day of the week

B: Month (Full Text)

m: Month (Numeric)

d: Day of the month

Y: Year

I: Hour (12-hour format)

H: Hour (24-hour format)

M: Minutes

P: AM/PM

Q: Shorthand for Today, Yesterday or ABdY

R: Shorthand for HM

S: Seconds

T: Timezone

Inbound calls check calltime:

(this example is for yesterday and says "Monday March 25th 2013")

cm\_date.agi,-86400---ABdY

## **cm\_dnc.agi**

Designed to work with Cell Menus to allow setting of a number as DNC or NI. This script is meant as a replacement for the agi-VDADinbound\_NI\_DNC\_CIDlookup.agi script. It is designed to work easily in the Call Menu framework, it plays no audio itself, and it has more options.

Flag Options:

1- run as DNC status or NI status (Default=NI)

2- default to insert into the dialer \_dnc table for DNC selections (Default=YES)

3- campaign to take dnc settings from(overrides option 2)

4- call menu option to send the call to after executing (Default=B)

5- if option 3 is used, search for lead in campaign lists or whole system(CAMP or SYS) (Default=SYS)

Example of what to put in the AGI entry for a Call Menu AGI route:

cm\_dnc.agi,DNC---YES---TESTCAMP---B---CAMP

cm\_lookup.agi

For use with a Call Menu in the custom dialplan section.

**Settings:**

1. The dialer \_list field to do a lookup on ('vendor\_lead\_code' is default)

2. Type of lookup to do: (default is SYSTEM)
  - SYSTEM will search the entire system
  - CAMPAIGNLISTS will search inside all of the active lists within the campaign
  - CAMPLISTSALL will search inside all of the active and inactive lists within the campaign
  - LIST will search only within the specified List ID
3. If CAMPAIGN or LIST is used above, this is the campaign\_id or list\_id to be used
4. TTS confirmation of name (1 for yes, 2 for no) put in TTS prompt ID
5. Update the dialer \_list record phone number with the callerID of the caller:
  - Y - update the record with the phone number
  - N - Do nothing (default)
6. Update lead's address3 field to the uniqueid of the call
  - Y - update the record with the uniqueid
  - N - Do nothing (default)
7. Update the lead's record with the call's agent\_user\_id variable
  - Y - update the lead record's 'user' field with the agent\_user\_id variable
  - COMMENTS - update the lead record's 'comments' field with the agent\_user\_id variable
  - N - Do nothing (default)
8. Update the lead's record with the call's title variable
  - Y - update the lead record's 'title' field with the call's title variable
  - N - Do nothing (default)

Found entries will send the call to the 'A' option in the source call menu

Not-Found entries will send the call to the 'B' option in the source call menu

Example with 8-digit vendor lead codes:

```
exten => _XXXXXXXX,1,AGI(cm_lookup.agi,vendor_lead_code---CAMPLISTSALL---
TESTCAMP---lastname_oneyestwono---N---N---Y---N)
```

Example with 8-digit vendor lead codes:

```
exten => _XXXXXXXX,1,AGI(cm_lookup.agi,vendor_lead_code---CAMPLISTSALL---
TESTCAMP---lastname_oneyestwono---N---N---Y---N)
```

## **cm\_areacode.agi**

Designed to work with Call Menus to allow searching of the areacode of the caller ID phone number the customer called in on, to be searched within the dialer \_phone\_codes table to gather the state, then search the dialer \_inbound\_dids table for that state in the did\_carrier\_description field and send the call on to the did that matches.

If areacode is not found call will go to the 'D' option in the call menu

If state DID is not found call will go to the 'C' option in the call menu

Flag Options:

- 1- Country code to search the areacode within, default 1
- 2- Length of areacode in digits, default 3
- 3- DID prefix to filter by in searching for DID's, default 999

example of what to set in the Call Menu:

- Set the prompt to "sip-silence"
- Set the Timeout to 1 second
- Option: "Timeout" Route: "AGI" AGI: "cm\_areacode.agi,1---3---999"

## cm\_cid\_change.agi

Designed to allow you to change the CID of a call to either a fixed number or a combination of CUSTOMER, CLOSER just like the in-group Action Transfer CID feature. Script is designed to handle calls already assigned to leads, not new inbound calls that only have a phone number.

Flag Options:

- 1- Fixed CID number, or CUSTOMER or CUSTOMERCLOSER

example of what to put in the AGI entry for a Call Menu AGI route:

cm\_cid\_change.agi,CUSTOMERCLOSER

## cm\_fpg.agi

Designed to work with Cell Menus to allow the entry of a CID number into a Filter Phone Group. It is designed to work easily in the Call Menu framework, it plays no audio itself, and it has more options.

Flag Options:

- 1- Filter Phone Group ID to insert into
- 2- call menu option to send the call to after executing (Default=B)
- 3- (optional) number to enter instead of CIDnumber

example of what to put in the AGI entry for a Call Menu AGI route(CID method):

cm\_fpg.agi,TEST\_FPG---B

example of what to put in the Custom Dialplan Entry of a Call Menu (caller entry of number method):

exten => \_XXXXXXXXXX,1,cm\_fpg.agi,99test---C---\${EXTEN}

## cm\_postal.agi

Designed to work with Cell Menus to allow searching of the number entered by the customer to be searched within the dialer \_postal\_codes table to gather the state, then search the dialer \_inbound\_dids table for that state in the did\_carrier\_description field and send the call on to the did that matches.

If postal code is not found call will go to the 'D' option in the call menu

If state DID is not found call will go to the 'C' option in the call menu

Flag Options:

- 1- minimum number of digits allowed in postal code, default 5
- 2- DID prefix to filter by in searching for DIDs, default 999

example of what to put in the Custom Dialplan entry for a Call Menu:

exten => \_XXXXXX,1,AGI(cm\_postal.agi,5---999)

## cm\_phonesearch.agi

Designed to work with Call Menus to allow searching of the caller ID phone number the customer called in with against the dialer \_list table, and finding the list of the best match, the campaign tied to that list and the default transfer in-group of that campaign, then transferring the call to that in-group. The most common use of this script is within a Call Menu that has a DID pointed directly to it. You will need to define the B, C and D options in the Call Menu, and the B and C options should use the CLOSER Handle Method, while the D option should use the CID Handle Method.

If phone number is not found, call will go to the 'D' option in the call menu

If default in-group is not found, call will go to the 'C' option in the call menu

If default in-group is found, call will go to the 'B' option in the call menu

### Flag Options:

1- Country code to search the areacode within, default 1

2- Match lead order, default: "entry\_newest"

entry\_newest - entry\_date newest match

entry\_oldest - entry\_date oldest match

modify\_newest - modify date newest match

modify\_oldest - modify date oldest match

call\_newest - last called date newest match

call\_oldest - last called date oldest match

rank\_highest - highest rank field value

rank\_lowest - lowest rank

### Example of what to set in the Call Menu:

Set the prompt to "sip-silence"

Set the Timeout to 1 second

Option: "Timeout" Route: "AGI" AGI: "cm\_phonesearch.agi,1---entry\_newest"

OR JUST

Set the prompt to "sip-silence|cm\_phonesearch.agi,1---entry\_newest"

## cm\_sc\_areacode.agi

This script is designed to work with Call Menus to allow searching of the areacode of the caller ID phone number the customer called in with to be searched within the dialer \_phone\_codes table to gather the state, or use the lead\_id of the already-established call, then use the settings container ID to gather the state routing parameters to find the destination for that state

If areacode is not found, call will go to the 'D' option in the call menu

If destination is not found, call will go to the 'C' option in the call menu

## Flag Options:

- 1- Country code to search the areacode within, default 1
- 2- Length of areacode in digits, default 3
- 3- container\_id for settings container with state and routing parameters

## Example of what to set in the Call Menu:

- Set the prompt to "sip-silence"
- Set the Timeout to 1 second
- Option: "Timeout" Route: "AGI" AGI: "cm\_sc\_areacode.agi,1---3---east\_west"

Example of what to put in settings container:

NOTE: if you want any state non-matches to go to a destination, put that line FIRST  
<destination type>|<destination>|<states list separated by spaces>  
DID|9998881111|--NOMATCHES--  
DID|9998882222|FL TX NY CA  
EXTEN|919998887112|AL MS MO TN KY  
CALLMENU|test\_menu|IL MN WI MI IA

## cm\_sc\_ccc\_lookup\_insert.agi version 2.14

Designed to work with Call Menus to send a URL defined in a Settings Container for a call with a call\_id associated with it for calls coming from an external Dialer system on a private IAX trunk so that the lead information can be copied to this destination cluster.

If container is not found, call will go to the 'C' option in the call menu

If call\_id is not defined, call will go to the 'D' option in the call menu

If lead is not found on external system, call will go to the 'B' option in the call menu

If lead is found on external system, call will go to the 'A' option in the call menu

Flag Options: (separated by triple-pipe: "---")

- 1- container\_id for settings container with URL to send
- 2- local list\_id to insert lead into(if not populated, will use external list\_id)

example of what to set in the Call Menu:

Set the prompt to "wait-moment|cm\_sc\_ccc\_lookup\_insert.agi,ccc\_test---8199"

The URL that you define in the Settings Container will need to be sent to you by the administrator of the external system. It should look something like this:

```
http://server/dialer /non_agent_api.php?  
user=6666&pass=1234&source=test&function=ccc_lead_info&call_id=--A--call_id--B--
```

## cm\_sc\_send\_url.agi

Designed to work with Call Menus to send a URL defined in a Settings Container for a call with a lead\_id associated with it(use CUSTOMERCLOSER in the In-Group Action Transfer CID field!).

If container is not found, call will go to the 'C' option in the call menu If lead\_id is not defined, call will go to the 'D' option in the call menu After URL is sent, call will go to the 'B' option in the call menu

Flag Options:

1- container\_id for settings container with URL to send

example of what to set in the Call Menu:

Set the prompt to "sip-silence|cm\_sc\_send\_url.agi,test\_cm\_url"

The URL that you define in the Settings Container can use most of the variables you can use in the Dispo Call URL fields. The 'user' and 'status' fields as well as the talk\_time, talk\_time\_min and ivr\_time fields that are also available will all use the last dialer \_agent\_log entry for it's values.

## **cm\_speak\_var.agi**

Runs after a call has lead\_id assigned to it, can speak letters/numbers.

You need to put lines similar to those below in your extensions.conf file:

Below are the parameters needed for the script to be run properly

1- function: (say\_digits, say\_number, say\_alpha, say\_datetime, say\_phonetic, stream\_file)

2- field: (any dialer \_list field)

3- variable type: DB(default) or DP(Asterisk Dialplan Variable)

example to use as part of a Call Menu Prompt:

cm\_speak\_var.agi,say\_digits---security\_phrase---DB

## **cm\_status\_dial.agi**

Used as a Call Menu AGI option route to alter status of a lead before dialing. The lead is only updated if the call is tagged with a lead\_id before this script.

You need to put lines similar to those below in your extensions.conf file:

Below are the parameters needed for the script to be run properly

1. the status to change the lead to

2. the phone number or extension to dial

3. the context to dial in

inbound calls check calltime:

cm\_status\_dial.agi,XFER-----917275551212----- default

## **cm\_wait.agi**

Designed to make a call wait for X milliseconds before exiting.

example of what to include as part of the Prompt in a Call Menu:

cm\_wait.agi,1000

## **debug\_speak.agi**

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE



Runs during any extension and speaks the extension sent to it while printing the extension as well as lots of info about the call to STDERR

You need to put lines similar to those below in your extensions.conf file:

inbound errors with speaking of extension:

```
exten => _XXXX,1,AGI(debug_speak.agi,${EXTEN})
exten => _XXXX,3,Hangup
```

## invalid\_speak.agi

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

Runs during an invalid extension and speaks the extension sent to it while printing to STDERR

You need to put lines similar to those below in your extensions.conf file:

Inbound errors with speaking of extension:

```
exten => _XXXX,1,AGI(invalid_speak.agi,${EXTEN})
exten => _XXXX,2,Playback(invalid)
exten => _XXXX,3,Hangup
```

```
exten => _*XXXXXXXXXXXX*XXXX,1,AGI(invalid_speak.agi,${EXTEN})
exten => _*XXXXXXXXXXXX*XXXX,2,Playback(invalid)
exten => _*XXXXXXXXXXXX*XXXX,3,Hangup
```

```
exten => _*XXXXXXXXXXXX*XXXX*,1,AGI(invalid_speak.agi,${EXTEN})
exten => _*XXXXXXXXXXXX*XXXX*,2,Playback(invalid)
exten => _*XXXXXXXXXXXX*XXXX*,3,Hangup
```

```
exten => _**XXXX,1,AGI(invalid_speak.agi,${EXTEN})
exten => _**XXXX,2,Playback(invalid)
exten => _**XXXX,3,Hangup
```

```
exten => _**XXXX*,1,AGI(invalid_speak.agi,${EXTEN})
exten => _**XXXX*,2,Playback(invalid)
exten => _**XXXX*,3,Hangup
```

## park\_call\_IVR\_example.agi

NOTE: THIS SCRIPT IS ONLY AN EXAMPLE AND MUST BE CUSTOMIZED TO USE IT

Defined in the Park Call AGI IVR field of a campaign, this script will ask customer for their ID and then populate it in the dialer \_list table and then send the call back to the agent. If the customer enters nothing X number of times then the call can be kicked out to a separate in-group.

NOTE: this script is an example of how you can use a custom AGI script with the new Park Call IVR feature in campaigns. You will most likely need to significantly alter this script to suit your specific needs.

Here is a list of the variables that you can set:

1. Language - default: en (English), other options are es-Spanish, fr-French
2. First prompt - default: please\_enter\_id\_number
3. You-Entered prompt - default: you-entered
4. Confirmation prompt - default: confirm\_id\_number
5. Thank you prompt - default: auth-thankyou
6. Invalid prompt - default: buzz
7. Attempts before kick-out - default: 2
8. Kick-out prompt - default: outside-transfer
9. Kick-out In-Group

Example Park Call AGI IVR field:

park\_call\_IVR\_example.agi|en---please\_enter\_id\_number---you-entered---confirm\_id\_number---auth-thankyou---buzz---2---outside-transfer---TEST\_IN

## **park\_CID.agi**

runs before the park extension to populate the parked\_channels entry with the channel's callerid

You need to put lines similar to those below in your extensions.conf file:

Outbound dialing:

```
exten => 8301,1,Answer
exten => 8301,2,AGI(park_CID.agi)
exten => 8301,3,Playback(park)
exten => 8301,4,Hangup
```

timer\_rebeep.agi

This script is designed to be launched from the in-group/campaign timer setting to set another trigger event for the next X seconds. Often used for calls that need to have a periodic beep signifying that the call is being recorded.

Just add the following to the System Settings Custom Dialplan Entry and set rebuild conf=Y

```
exten => 8399,1,Answer
exten => 8399,n,Wait(1)
exten => 8399,n,Playback(beep)
exten => 8399,n,AGI(timer_rebeep.agi,20---D1_DIAL_QUIET)
exten => 8399,n,Hangup
```

Below are the parameters needed for the script to be run properly

1. seconds delay before next trigger goes
2. timer action to launch

Then set the in-groups/campaigns that you want to have this enabled

```
"Timer Action" = D1_DIAL_QUIET
"Timer Action Seconds" = 20
"Transfer Conf Number 1" = 8399
```

## phone\_alt\_CID.agi

This script changes the CallerID number on calls that pass through it to the Alternate defined in the 'phones' record for the phone that placed the call

You need to have lines similar to those below in your Custom Dialplan:

```
;use alternate CID, if defined:
exten => _91NXXNXXXXXX,1,AGI(phone_alt_CID.agi,${EXTEN})
exten => _91NXXNXXXXXX,n,Goto(default,${EXTEN},1)
```

The easiest way to set this up for a phone is to create a new Call Menu and then put the above Custom Dialplan into it, then set the Phone's 'phone context' to the call menu ID that you just created.

## VD\_amd.agi

Runs after a call goes through AMD in extensions.conf to send the call on to # it's proper destination, or when agent sends to VM message.

You need to put lines similar to those below in your extensions.conf file:

DIALER auto dialer transfer script AMD with Load Balanced:

```
exten => 8369,1,AGI(call_log.agi,${EXTEN})
exten => 8369,2,(AMD),AMD
exten => 8369,3,AGI(VD_amd.agi,${EXTEN} -----NO)
exten => 8369,4,AGI(agi-VDAD_LB_transfer.agi,${EXTEN})
exten => 8369,5,AGI(agi-VDAD_LB_transfer.agi,${EXTEN})
exten => 8369,6,AGI(agi-VDAD_LB_transfer.agi,${EXTEN})
exten => 8369,7,Hangup

exten => 8320,1,AGI(VD_amd.agi,${EXTEN} ----- YES)
exten => 8320,2,Hangup
exten => _8320*.,1,AGI(VD_amd.agi,${EXTEN} ---- YES)
exten => _8320*.,2,Hangup
```

## VD\_auto\_post\_VERIFY.agi

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

Runs after a call is answered

NOTE: This script is only used with auto-message campaigns with dynamic data

You need to put lines similar to those below in your extensions.conf file:

```
DIALER auto dialer transfer script AMD with Load Balanced:
exten => 8320,1,WaitForSilence(2000,2) ; wait for 2 seconds of silence
exten => 8320,2,AGI(VD_auto_post_VERIFY.agi,${EXTEN})
exten => 8320,3,Hangup
```

## VDL\_CID\_lookup.agi

NOTE: THIS SCRIPT IS NO LONGER IN ACTIVE USE

Runs after a call goes through AMD in extensions.conf to send the call on to it's proper destination

You need to put lines similar to those below in your extensions.conf file:

DIALER auto dialer transfer script AMD with Load Balanced:

```
exten => 8369,1, Ringing
exten => 8369,2, Wait(1)
exten => 8369,3, Answer
exten => 8369,4, AGI(VDL_CID_lookup.agi)
exten => 8369,5, AGI(agi-VDAD_ALL_inbound.agi, CID-----LB-----IN_TEST-----7275551212-----
Closer-----park-----999----- 1)
exten => 8369,6, Hangup
exten => 8369,7, AGI(call_logCID.agi, ${EXTEN}-----${CALLERID}-----${CALLERIDNUM} ----- ${
CALLERIDNAME})
exten => 8369,8, AGI(agi-VDADinbound_NI_DNC_CIDlookup.agi)
exten => 8369,9, Hangup
```

## **FREQUENTLY ASKED QUESTIONS**

### **Why can't my agents log in to the campaign until 9AM?**

If there are no leads in the dial hopper for a campaign, then no agents are allowed to log in to the campaign. Since most campaigns in the USA will use the 9am-9pm call time definition, there will be no leads loaded with this definition for the campaign until it is 9:00:00 AM in the first time zone that you have leads for.

### **Why can't I use spaces, dashes or other special characters in some form fields?**

This is for security and data integrity reasons. Putting certain combinations of special non letter or number characters in a login prompt for instance can corrupt or delete data in the system. Dialer filters many fields so that these characters are removed and can cause no harm to the system.

### **Why are there two agents in the same session talking to each other?**

This usually happens when one of the agents does not log out properly or does not hang up their phone when they log out. When an agent is done and wants to log out, it is very important that they click on the LOGOUT link at the top of their agent screen.

## GLOSSARY

**Agent** – Another name for a user on Dialer , it also implies they do not have administrator access

**AGI** - (Asterisk Gateway Interface) In Dialer AGI scripts are designed to allow application level control of selected features, and increasing their existing level of functionality.

**API** - (application programming interface) These can be set up to automatically execute commands that are generally handled by the agent or admin. Agent APIs deal with commands the agent would normally handle, while Non-agent APIs refer to administrator functions.

**Blended** - allowing both inbound and outbound calls

**Broadcast dialing** - a campaign that places calls without the aid of human agents. When the recipient answers a message is played and then call is disconnected. This is used for announcement recordings to be played to customers that have already opted to receive the call (school closings, prescription reminders, etc.). Also known as “robo-dialing”

**Call menu** - an automated attendant that plays an announcement to the caller, offering several routing choices based on which button they presses. This is also know as an IVR (interactive voice response).

**Call times** - In Dialer the outbound call time is relative to the local time zone of the lead being called. For example, if the campaign's call time was set to “9am-5pm”, a lead would not be called until it was at least 9am local time; regardless of what time zone they lived in. For inbound calls, the call time is based on the server time. Anything outside of that time is considered “after hours”.

**Campaign** - the basic module of Dialer , allowing for outbound calls. A user will need to log into a campaign to be able to place or receive phone calls.

**Carrier** - The telephony provider that connects calls to, and receives calls from, the public telephone network.

**Chanunavailable** - this indicates calls the dialer intended to place, but didn't have enough lines available to send it to the carrier.

**CID** - (caller identification) The phone number displayed on an outbound phone call

**Closer** - The agent that receives a transferred call from another user (the fronter) in Dialer .

**CNAM** - (Caller ID Name) The name displayed on the recipient's caller ID. While the caller ID number is sent along with the call, the caller ID name is supplied by the receiving party's carrier. If the recipient carrier's database is not updated frequently CNAM can display a previous owner for the phone number. Sometimes this may even display the state or “unknown” if the phone number doesn't exist in their database at all. Canada is the only exception, allowing carriers placing the call to send both caller ID number & name.

**CONGESTION** - a carrier message indicating the dialer sent calls to the carrier that they were unable to place.

**CRM** - (Customer Relationship Management or Customer Resource Management) Any system designed for storing and handling customer interactions and data. The custom fields feature allows you to create a wide array of new tables to retain customer information. They allow it to perform most CRM features. Dialer can integrate directly with any web-based CRM, using a URL string to post data.

**DID** - (Direct Inward Dialing) A phone number, provided by a carrier, so the dialer can receive incoming calls. Also called DDI (Direct Dial In) in Europe and Australia.

**Disposition** - The final status placed on a lead. (see “status”)

**DNC** - (Do Not Call) Customer designated to not be called back, either due to personal request or having been placed on the National Do Not Call list.

**DNIS** - (Dialed Number Identification Service) a carrier service that indicates which, of the many possible phone numbers a company may own, was dialed by the customer to reach them.

**Filter** - a script designed to use one or more set criteria to dial certain phone numbers that reside in a much larger list. For example, a list may contain thousands of leads for people spread across the country. A filter would allow you to dial only men named “Matthew” in one particular town.

**Fronter** - The user that transfers a phone call to another agent (the closer) in Dialer .

**Hotkeys** - A feature in Dialer that allows the agent to disposition calls more quickly. It is enabled in the campaign and statuses are assigned a preset number (0-9). The agent mouses over the “hotkeys” button on their screen and selects the corresponding number. This saves the time of going through several steps, and they are immediately available to take another call.

**IAX2** - (Inter-Asterisk eXchange) a voice over IP protocol native to Asterisk based systems. This is sometimes preferable to SIP, because it can navigate network firewalls more easily.

**Ingroup** - a queue, staffed by agents, allowing them to receive inbound calls. The Ingroup must be attached to a campaign, to allow the agents to log into it.

**Hopper** - Where the dialer temporarily places the leads, just prior to dialing them. Rather than pulling leads from the database one at a time, which is resource intensive, every 60 seconds the dialer grabs a group of leads. Once a lead is selected, the hopper script runs all of the system checks (call time, filter, DNC list, etc.) before placing it in the hopper to be dialed.

**LIDB** - (Line Information DataBase) used in the US and Canada to store and retrieve caller ID records.

**List ID Override** - Several campaign features can be overridden on a list by list basis. These features are: agent script, campaign caller ID, answering machine message, drop inbound group, web form, web form 2, and transfer-conf 1-5. If any of these are set on the list they will supersede the campaign's setting. Once a list override has been enabled, the word “OVERRIDE” will appear (in red print) next to the corresponding campaign setting.

**Manual dialing/click to dial** - This is the MANUAL campaign dial method. The leads have been preloaded into the dialer and selected for the campaign. The agent clicks a “dial” button on their interface to place a call to the lead the system selected for them. In this dial method the calls are placed one at a time. The agent initiates the call, although they have no choice regarding who is dialed.

**Phone Code Override** - This is found on the web-based lead loader and allows you to specify the phone code (also known as country code) for an entire list of leads, rather than on each one individually.

**Phone Number Prefix** - In the US, this is the set of 3 digits that immediately follows the area code. In the example phone number “123-456-7890”, the telephone prefix would be “456”.

**Phone registration** – In order for phone to work with Dialer , it needs to be registered to a phone extension at all times. First, the phone extension must be built in Dialer (Admin-Phones), for the phone to connect with. Then the software or hardware phone will require specific information to register (IP address, registration password, extension, VOIP protocol, etc.), depending on the type of phone. Once the phone registration has successfully completed, the agent can log into the system to place and receive calls.

**Predictive dialing/adaptive dialing** - This uses an algorithm and administrator configured settings to dynamically increase or decrease the number of calls placed per agent throughout the day. Because this dial method is designed to adjust as it dials, it requires less supervision than ratio dialing.

**Press 1** - a campaign that engages the recipient to “press 1” to continue (or agree to) the call, and is then transferred to an agent. This is type of call is currently illegal in the US unless it is placed business to business, for political, or not-for-profit purposes. This is known in Dialer as a “survey campaign”.

**Ratio dialing** – Using this dial method, the dialer allocates a set number of lines per agent. The dialer then constantly places calls on the allotted lines. For example, with a dial method of RATIO, and a dial level of 2, the system will constantly place 2 calls per logged in agent.

**Remote agents** - In terms of Dialer , this is any user that is connected to the system by phone only, and does not have a computer. This was originally designed for users out in the field, that may only be connected over a mobile phone or hardline. The dialer can still send them calls, but they don't have any of the call control functions offered in the agent interface.

**Ring-all** - An ingroup setting that allows all of the agents' phones to ring, rather than sending the call to just one of them. The first agent to answer their phone receives the call.

**Robo-dialing** - a campaign that places calls without the aid of human agents. When the recipient answers a message is played and then call is disconnected. This is used for announcement recordings to be played to customers that have already opted to receive the call (school closings, prescription reminders, etc.). Also known as “Broadcast dialing”

**Safe Harbor message** - Named because of its designed intent to comply with US FTC Safe-Harbor regulations (see “FTC Safe Harbor Regulations”). The second provision states that if a call is dropped, the caller must play a message stating the name of your company, why you are calling, and a phone



phone number where the company can be reached back.

**SIP** - (Session Initiated Protocol) a specific VOIP protocol. Dialer is capable of using either SIP or IAX2 protocols to send voice traffic.

**Status** - This is the system state of the lead. The system dynamically changes the status throughout an active call. For example, when the call is placed it's statused as DIALING, but once connected to a customer, the system will change it to INCALL. Once the call has ended, the final status placed on the lead is known as the disposition.

**Survey dialing** - a campaign that engages the recipient to “press 1” to continue (or agree to) the call, and is then transferred to an agent. This is type of call is currently illegal in the US unless it is placed business to business, for political, or not-for-profit purposes. This is also known as “Press 1” dialing.

**trunk** - A connection that allows calls to, and from, the dialer. A “trunk” generally refers to the connection with the carrier, but it can also include any other system that would send or receive calls with Dialer .

**TTS** - (Text To Speech) Dialer integrates with Cepstral Text To Speech, allowing written data to be spoken aloud over the phone.

**URL** - (Uniform Resource Locator) This is the specific character string displayed on top of a web browser, inside an address bar. This is usually designed to allow someone to access a resource of information on the internet or private network. Since Dialer is web-based, it can also be used to dynamically post information and integrate with other web-based systems (CRM, billing program, shipping & receiving software, etc.).

**User vs Phone** - This can be confusing to new users of Dialer . The phone (either softphone or hardware phone) is registered to a phone extension in the system. That phone extension is then assigned to that desk phone or PC, it doesn't move around (unless re-registered). The user represents a unique person and they can login from any registered phone. This why the dialer requires 2 separate logins for the agent. First the phone, then the user. So that understands where and whom it will be sending the phone calls.

**VDAD** - (Dialer Auto-Dial) When this is listed as the “user” for a call, it means the system handled it and it was never sent to an agent.

**VOIP** - (Voice Over Internet Protocol) The delivery of voice communication over a network (usually the internet), rather than using the Public Switched Telephone Network (PSTN).

**Web form** - A web page that allows a user to enter data that is sent to a server for processing. IN the case of Dialer , the Web Form & Web Form 2 buttons can launch different URL scripts containing static or variable data for performing a multitude of tasks. Generally this is the most common way for agents to send data to another web-based system (CRM, billing program, shipping & receiving software, etc.).

# APPENDIX

## ***Additional Screen-shots***

On the following pages, you will find many screenshots for the administration web screens.

HOME | Dashboard | Call | Logout | Change Language | Monday, April 16, 2023 8:28:20 AM  
 User State | User Status | Time Sheet | Crisis Status

MODIFY A USER'S RECORD: 7777

User Number: 7777

**PASSWORD IS ENCRYPTED. ONLY ENTER IN A PASSWORD BELOW IF YOU WANT TO CHANGE IT!**

Password:  Strength: **Weak** Length:

Force Change Password:

Last Login Info: **2023-03-28 04:36:14 - 2 - 12.11.40.115** [Login Summary](#)

Full Name: ADMIN OCcanner

User Level: ADMIN

User Group: ADMIN

Phone Login: 7777

Phone Pass: 7777 [send this user a login link email](#)

Active:

Voicemail ID: voicemail chooser

Email: info@woodal.com

Mobile Number: 8833939330

User Code:

User Location:  lookup by the sea - Leaderdate by the Sea, FL, USA

VERM Secondary User Group: UNDEFINED

Main Territory:

User Nickname:

User Territories:

User New Lead Limit:  User List Limit Overrides for this user

Overall Limit:

**AGENT INTERFACE OPTIONS:**

Agent Choose Ingroups:

Agent Choose Blended:

Agent Choose Territories:

Hot Keys Active:

Scheduled Callbacks:

Agent Only Callbacks:

Next Dial My Callbacks Override: NOT ACTIVE

Agent Call Manual:

Manual Dial Filter Override: DISABLED

Agent Call Email:

Agent Call Chat:

Agent Recordings:

Agent Transfers:

Closer Default Blended:

User Choose Language:

Selected Language: en\_english

Agent Recording Override: DISABLED

Mute Recordings Override: DISABLED

Agent After Customer Data Override: NOT ACTIVE

Agent Alter Customer Phone Override: NOT ACTIVE

Agent Shift Enforcement Override: DISABLED

Agent Call Log View Override: DISABLED

Campaign Hide Call Log Override: DISABLED

Agent Lead Search Override: NOT ACTIVE

Lead Filter: dialing only enabled with no-hopper manual

User Hide in RealTime:

Alert Enabled:

Allow Alerts:

Present Contact Search: NOT ACTIVE

Max Inbound Calls:  inbound calls today: 0

Max Inbound Calls Filtering Enabled:  inbound filtered calls today: 0

Max Inbound Calls Filtering Options:

Filter Statuses:

Filter In Groups:

Filter Minimum Seconds:

Max Manual Dial Hopper Calls:  hopper calls today: 0

Max Manual Dial Hopper Calls Per Hour:  hopper calls this hour: 0

Wrap Seconds Override:

Agent Ready Max Logout Override:

Additional Status Group: NONE

**Campaign Ranks:**

CAMPAIGN	RANK	GRADE	CALLS	WEB VARS
456 - HOSTCOMM Test Campaign	<input type="text"/>	<input type="text"/>	0	
ALLTEST - All dialing test	<input type="text"/>	<input type="text"/>	0	
APPTAGNT - Appointments All Agents	<input type="text"/>	<input type="text"/>	0	
APPTENG - Appointments English	<input type="text"/>	<input type="text"/>	0	
APPTESP - Appointments Spanish	<input type="text"/>	<input type="text"/>	0	
EMAILTEST - Inbound email tester	<input type="text"/>	<input type="text"/>	0	
INACTIVE - Test inactive campaign	<input type="text"/>	<input type="text"/>	0	
JDTEST - JD Test set con email	<input type="text"/>	<input type="text"/>	0	
MIKTEST - Bug verification	<input type="text"/>	<input type="text"/>	0	
SHIPAGNT - Shipping All Agents	<input type="text"/>	<input type="text"/>	0	
SHIPENG - Shipping English	<input type="text"/>	<input type="text"/>	0	
SHIPFRN - Shipping French	<input type="text"/>	<input type="text"/>	0	
SVYTEST - survey test campaign	<input type="text"/>	<input type="text"/>	0	
TEST_CMC - Test underscore test	<input type="text"/>	<input type="text"/>	0	
TEST2 - Campaign used for shared DNC list	<input type="text"/>	<input type="text"/>	0	
TEST3 - testing 3	<input type="text"/>	<input type="text"/>	0	
TESTSPACE - Test Campaign 1	<input type="text"/>	<input type="text"/>	0	
TESTSPC - test with a space	<input type="text"/>	<input type="text"/>	0	

**Inbound Groups:**

INBOUND GROUP	RANK	GRADE	CALLS	WEB VARS
<input checked="" type="checkbox"/> _STAV - testing options	<input type="text"/>	<input type="text"/>	0	
<input type="checkbox"/> 123 - enjeng	<input type="text"/>	<input type="text"/>	0	
<input checked="" type="checkbox"/> 25_CL_in - Test 2	<input type="text"/>	<input type="text"/>	0	
<input type="checkbox"/> 25SCL_in - Test 1	<input type="text"/>	<input type="text"/>	0	
<input type="checkbox"/> 5001 - Robert 501	<input type="text"/>	<input type="text"/>	0	
<input type="checkbox"/> 9999999 - 9999999	<input type="text"/>	<input type="text"/>	0	
<input type="checkbox"/> AAA_ALL_TEST - Alpha test	<input type="text"/>	<input type="text"/>	0	

Custom 1:

Custom 2:

Custom 3:

Custom 4:

Custom 5:

QC Enabled:

QC User Level:

QC Pass:

QC Finish:

QC Commit:

**ADMIN REPORT OPTIONS:**

Realtime Block User Info:

Admin Hide Lead Data:

Admin Hide Phone Data:

Search Lead Ignore Group Restrictions:

**ADMIN INTERFACE OPTIONS:**

View Reports:

Access Recordings:

Alter Agent Interface Options:

Modify Users:

Change Agent Campaign:

Delete Users:

Modify User Groups:

Delete User Groups:

Modify Lists:

Delete Lists:

Load Leads:

Modify Leads:

GDPR-Compliant Export Delete Leads:

Download Lists:

Export Reports:

Delete From DNC Lists:

Custom Fields Modify:

Modify Campaigns:

Campaigns Detail:

Delete Campaigns:

Modify In-Groups:

Delete In-Groups:

Modify DIDs:

Delete DIDs:

Modify Custom Campaigns:

Modify Remote Agents:

Delete Remote Agents:

Modify Scripts:

Delete Scripts:

Modify Filters:

Delete Filters:

AGC Admin Access:

AGC Delete Phones:

Modify Call Times:

Delete Call Times:

Modify Servers:

Modify Shifts:

Modify Phones:

Modify Carriers:

Modify Email Accounts:

Modify Labels:

Modify Colors:

Modify Languages:

Modify Statuses:

Modify Voicemail:

Modify Audio Store:

Modify Music On Hold:

Modify TTS:

Modify Contacts:

CallCard Access:

Modify Automated Reports:

Add Timeclock Log Record:

Modify Timeclock Log Record:

Delete Timeclock Log Record:

Manager Shift Enforcement Override:

Manager Pause Code Approval:

Admin Custom Fields Show Hidden:

**SECURITY OPTIONS, Only enable if needed:**

Modify IP Lists:

Ignore IP List:

Two Factor Auth Override: NOT ACTIVE

**API USER OPTIONS, Only enable if needed:**

Agent API Access:

API List Restrict:

API Allowed Functions:

**DISABLE ADMIN AND AGENT SCREEN OPTIONS:**

API Only User:

**LEVEL 9 ADMIN OPTIONS:**

Modify Same User Level:

Download Invald Files:

Alter Admin Interface Options:

**DELETE THIS USER**

[Click here for user time sheet](#)

[Click here for user status](#)

[Click here for user: multiple dn, status, detail record](#)

[Click here for user: Callback, leads](#)

[Click here to see Admin changes in this record](#)

[Click here for user: multiple svr, status, detail record](#)

[Click here for user: Callback, leads](#)

[Click here to see Admin changes in this record](#)

VERSION 1.4.17.0  
 8:28 AM EDT  
 8:28 AM EDT

Figure 124. User Modification Page

The image displays a complex web interface for managing campaigns. It is divided into several vertical panels:

- Left Panel:** Contains campaign details such as 'Campaign Name', 'Start Date', and 'End Date'. It also lists various 'Action' items like 'Add User Group', 'Web Form Target', and 'Allow Chosen'.
- Middle Panel:** A large list of configuration items, each with a name and a status (e.g., 'SCHEDULED', 'ENABLED', 'DISABLED'). These include 'SCHEDULED CALLBACKS', 'SCHEDULED CALLBACKS HOUR', 'SCHEDULED CALLBACKS COUNTRY', and many others.
- Right Panel:** Features a 'Default Transfer Group' dropdown and a list of 'Agent Transfer In-Group Validation' rules. Below this is a table with columns for 'STATUS', 'STATUS NAME', 'CALLED', 'NOT CALLED', 'DROPPABLE', and 'PENALIZATION'. The table lists various call types and their associated settings.

Figure 125. Campaign Modification Page

**ADMINISTRATION** TESTCAMP: Basic Detail **Statuses** HotKeys Lead Recycling Auto Alt Dial List Mix Survey Pause Codes AC-CID QC Real-Time

**CUSTOM STATUSES WITHIN THIS CAMPAIGN:** ?

AGENT SELECTABLE HUMAN ANSWER SALE DNC CUSTOMER CONTACT NOT INTERESTED UNWORKABLE SCHEDULED CALLBACK COMPLETED ANSWERING MACHINE

STATUS	DESCRIPTION	CATEGORY	MIN SEC	MAX SEC	MODIFY/DELETE
SALEC	Campaign Sale	SALES - Sales statuses	0	0	MODIFY DELETE

**ADD NEW CUSTOM CAMPAIGN STATUS**

Status: Description: Selectable: Y Human Answer: N  
 Sale: N DNC: N Customer Contact: N Not Interested: N  
 Unworkable: N Callback: N Completed: N Answering Machine: N Category: SALES - Sales statuses

ALLOWED IN-GROUPS USING A STATUS GROUP OVERRIDE:  
 CAMPAIGN LISTS USING A STATUS GROUP OVERRIDE:

Figure 126. Campaign Statuses Page

Figure 127. Campaign HotKeys Page

**ADMINISTRATION** CAMPAIGN HOT KEY ADDED: TESTCAMP - NP - 4 TESTCAMP: Basic Detail Statuses **HotKeys** Lead Recycling Auto Alt Dial List Mix Survey Pause Codes AC-CID QC Real-Time

**CUSTOM HOT KEYS WITHIN THIS CAMPAIGN:** ?

HOT KEY	STATUS	DESCRIPTION	DELETE
1	A	Answering Machine	DELETE
2	N	No Answer	DELETE
3	NI	Not Interested	DELETE
4	NP	No Pitch No Price	DELETE

**ADD NEW CUSTOM CAMPAIGN HOT KEY**

Hotkey: 1 Status: A - Answering Machine ADD



**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys **Lead Recycling** Auto Alt Dial List Mix Survey Pause Codes AC-CID QC Real-Time

LEAD RECYCLING WITHIN THIS CAMPAIGN: ?

STATUS	ATTEMPT DELAY	ATTEMPT MAXIMUM	LEADS AT LIMIT	ACTIVE	DELETE
AB	600	4	0	Y	MODIFY DELETE
B	600	4	0	N	MODIFY DELETE

ADD NEW CAMPAIGN LEAD RECYCLE

Status: A - Answering Machine Attempt Delay: Attempt Maximum: ADD

\* Lead counts taken from active lists in the campaign only.

Figure 128. Campaign Lead Recycling Page

Figure 129. Campaign Auto Alt-Dial Page

**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling **Auto Alt Dial** List Mix Survey Pause Codes AC-CID QC Real-Time

AUTO ALT NUMBER DIALING FOR THIS CAMPAIGN: ?

STATUSES	DELETE
B	DELETE
N	DELETE
NA	DELETE
DC	DELETE

ADD NEW AUTO ALT NUMBER DIALING STATUS

Status: A - Answering Machine ADD

**ADMINISTRATION**

- Reports
- Users
- Campaigns**
  - Campaigns Main
  - Statuses
  - HotKeys
  - Lead Recycle
  - Auto-Alt Dial
  - List Mix
  - Pause Codes
  - Presets
  - AC-CID
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling Auto Alt Dial **List Mix** Survey Pause Codes Presets AC-CID QC Real-Time

LIST MIXES FOR THIS CAMPAIGN: ?

WARNING, we only recommend List Mix for advanced users, Please read the Manager Manual

**testmix3:** yet another mix [DELETE LIST MIX](#)

Status: **ACTIVE** Method: **EVEN\_MIX**

LIST ID	PRIORITY	% MIX	STATUSES
List: 107 <a href="#">REMOVE</a>	1	100	NEW N DROP A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 223344 <a href="#">REMOVE</a>	10	0	- - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>

Difference %: 0

List:  ZY12 CBTEST QCFAIL WN - Select A Status - [ADD](#) [REMOVE](#)

CHANGE: [ALL](#) [EMPTY](#)

**testmix:** test mix [DELETE LIST MIX](#)

Status: **INACTIVE** [SET TO ACTIVE](#) Method: **RANDOM**

LIST ID	PRIORITY	% MIX	STATUSES
List: 101 <a href="#">REMOVE</a>	1	15	CALLBK AL NI N NA B - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 108 <a href="#">REMOVE</a>	2	18	AB NI N NA B - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 177 <a href="#">REMOVE</a>	3	10	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 107 <a href="#">REMOVE</a>	4	12	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 107 <a href="#">REMOVE</a>	5	15	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 177 <a href="#">REMOVE</a>	6	9	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 177 <a href="#">REMOVE</a>	7	2	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 9988 <a href="#">REMOVE</a>	8	1	NI N NA B - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 9988 <a href="#">REMOVE</a>	9	1	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 9988 <a href="#">REMOVE</a>	10	2	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 107 <a href="#">REMOVE</a>	11	5	AA NI N NA B DROP A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 107 <a href="#">REMOVE</a>	12	5	SALE SSALE - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 1234 <a href="#">REMOVE</a>	13	4	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>
List: 201 <a href="#">REMOVE</a>	14	1	NI N NA B A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>

Difference %: 0

List:  ZY12 CBTEST QCFAIL WN - Select A Status - [ADD](#) [REMOVE](#)

CHANGE: [ALL](#) [EMPTY](#)

**testmix2:** another mix [DELETE LIST MIX](#)

Status: **INACTIVE** [SET TO ACTIVE](#) Method: **EVEN\_MIX**

LIST ID	PRIORITY	% MIX	STATUSES
List: 101 <a href="#">REMOVE</a>	1	100	A - - Select A Status - <a href="#">ADD</a> <a href="#">REMOVE</a>

Difference %: 0

List:  ZY12 CBTEST QCFAIL WN - Select A Status - [ADD](#) [REMOVE](#)

CHANGE: [ALL](#) [EMPTY](#)

**ADD NEW LIST MIX**

Mix ID: <input type="text"/>	Mix Name: <input type="text"/>	Mix Method: <b>EVEN_MIX</b>
List: <input type="text" value="107 - performance list"/>	Dial Status: <input type="text" value="22222 - test"/>	<input type="button" value="SUBMIT"/>

Figure 130. Campaign List Mix Page

**ADMINISTRATION**  
[Reports](#)  
[Users](#)  
[Campaigns](#)  
[Campaigns Main](#)  
[Statuses](#)  
[HotKeys](#)  
[Lead Recycle](#)  
[Auto-Alt Dial](#)  
[List Mix](#)  
[Pause Codes](#)  
[Presets](#)  
[AC-CID](#)  


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[Lists](#)  
 [Quality Control](#)  
 [Scripts](#)  
 [Filters](#)  
 [Inbound](#)  
 [User Groups](#)  
 [Remote Agents](#)  
 [Admin](#)

**TESTCAMP:**
Basic   Detail   Statuses   HotKeys   Lead Recycling   Auto Alt Dial   List Mix   **Survey**   Pause Codes   AC-CID   QC   Real-Time

**SURVEY SETTINGS FOR THIS CAMPAIGN:**

Survey First Audio File:	US_pol_survey_hello <a href="#">audio chooser</a> ?
Survey DTMF Digits:	1238 ?
Survey Not Interested Digit:	8 ?
Survey Wait Seconds:	10 ?
Survey Opt-in Audio File:	US_pol_survey_transfer <a href="#">audio chooser</a> ?
Survey Not Interested Audio File:	US_thanks_no_contact <a href="#">audio chooser</a> ?
Survey Method:	AGENT_XFER ?
Survey No-Response Action:	OPTIN ?
Survey Not Interested Status:	NI - Not Interested ?
Survey Third Digit:	? ?
Survey Third Audio File:	US_thanks_no_contact <a href="#">audio chooser</a> ?
Survey Third Status:	NI ?
Survey Third Extension:	8300 ?
Survey Fourth Digit:	? ?
Survey Fourth Audio File:	US_thanks_no_contact <a href="#">audio chooser</a> ?
Survey Fourth Status:	NI ?
Survey Fourth Extension:	8300 ?
Survey Response Digit Map:	1-DEMOCRAT 2-REPUBLICAN 3-INDEPENDANT 8-OPTOUT X-NO RESPONSE  ?
Survey Survey Xfer Extension:	8300 ?
Survey Campaign Recording Directory:	/home/survey ?
Voicemail:	<a href="#">voicemail chooser</a> ?
Survey Call Menu:	?
Survey Recording:	N ?

**Figure 131. Campaign Survey Page**



**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling Auto Alt Dial List Mix Survey **Pause Codes** Presets AC-CID QC Real-Time

**AGENT PAUSE CODES FOR THIS CAMPAIGN:** ?

PAUSE CODES	BILLABLE	TIME LIMIT	MGR APPROVAL	MODIFY	DELETE
BREAK Break time	YES	600	NO	MODIFY	DELETE
COACH Coaching	NO	65000	YES	MODIFY	DELETE
LUNCH Lunch Time	NO	20	NO	MODIFY	DELETE
TOILET bathroom break	YES	120	NO	MODIFY	DELETE
TRAIN Training	HALF	60	NO	MODIFY	DELETE

ADD NEW AGENT PAUSE CODE

Pause Code:  Name:  Billable: YES

Mgr Approve: NO Time Limit:

ADD

Figure 132. Campaign Pause Codes Page

Figure 133. Campaign Presets

**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling Auto Alt Dial List Mix Survey Pause Codes **Presets** AC-CID QC Real-Time

**18 PRESETS FOR THIS CAMPAIGN:** ?

ADD NEW PRESET -

Preset Name:  Number:  DTMF:  Hide Number: N

#	PRESET NAME	NUMBER	DTMF	HIDE	MODIFY	DELETE
1	Allison Flores	106		N	MODIFY	DELETE
2	Bob Smith	101		N	MODIFY	DELETE
3	Cyrus Small	105		N	MODIFY	DELETE
4	Harold Paulson	107		N	MODIFY	DELETE
5	HE	5678		N	MODIFY	DELETE
6	Jenny Johnson-Smith	104		N	MODIFY	DELETE
7	Jon Wilson	103		N	MODIFY	DELETE
8	Matt Tyson	108		N	MODIFY	DELETE
9	ME	987654		N	MODIFY	DELETE
10	ME testing-g	987654		N	MODIFY	DELETE
11	Mike Redding	109		N	MODIFY	DELETE
12	number four testing preset	8301	...1...12345#	N	MODIFY	DELETE
13	number three testing preset	999888112	...1...12345#	N	MODIFY	DELETE
14	number two testing preset	8304	...1...123456#	Y	MODIFY	DELETE
15	PG&E	8301		N	MODIFY	DELETE
16	Sally Smith	102		N	MODIFY	DELETE
17	T6-JK	123456		N	MODIFY	DELETE
18	Tara Tennison	110		N	MODIFY	DELETE

**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling Auto Alt Dial List Mix Survey Pause Codes Presets AC-CID QC Real-Time

**AREACODE CIDS FOR THIS CAMPAIGN:** ?

#	AREACODE	CID NUMBER	DESCRIPTION	ACTIVE <small>select all</small>	CALLS	DELETE
1	201	7275551212	Test number first	<input type="checkbox"/>	0	<a href="#">DELETE</a>
2	201	7275551213	testing again	<input type="checkbox"/>	0	<a href="#">DELETE</a>
3	201	7275551214	test	<input type="checkbox"/>	0	<a href="#">DELETE</a>
4	202	7275551212	done	<input type="checkbox"/>	0	<a href="#">DELETE</a>
5	202	7275551213	okjh	<input type="checkbox"/>	0	<a href="#">DELETE</a>
6	203	7275551212	testing	<input type="checkbox"/>	0	<a href="#">DELETE</a>
7	989	3125551212	test custom link cid	<input type="checkbox"/>	0	<a href="#">DELETE</a>
8	989	9895551212	asdfasof	<input type="checkbox"/>	0	<a href="#">DELETE</a>
9	99	9999988888	testing variable 1	<input checked="" type="checkbox"/>	0	<a href="#">DELETE</a>
10	999	454552221	test 999	<input checked="" type="checkbox"/>	0	<a href="#">DELETE</a>
11	999	454552222	test 999	<input checked="" type="checkbox"/>	0	<a href="#">DELETE</a>
12	999	454552223	test 999	<input checked="" type="checkbox"/>	1	<a href="#">DELETE</a>
13	999	9999988887	testing variable 2	<input type="checkbox"/>	0	<a href="#">DELETE</a>
14	9998	9999988886	testing variable 3	<input type="checkbox"/>	0	<a href="#">DELETE</a>
15	99988	9999988885	testing variable 4	<input type="checkbox"/>	0	<a href="#">DELETE</a>
16	9999	9999988884	testing variable 5	<input type="checkbox"/>	0	<a href="#">DELETE</a>

ADD NEW AREACODE CID

Areacode:  Outbound CID:

Description:

[Click here to see Admin changes to this campaign AC-CID](#)

Figure 134. Campaign AC-CID

Figure 135. Campaign QC Page

**ADMINISTRATION** TESTCAMP: Basic Detail Statuses HotKeys Lead Recycling Auto Alt Dial List Mix Survey Pause Codes Presets AC-CID QC Real-Time

**QC SETTINGS FOR THIS CAMPAIGN:**

QC Statuses:  ?

QC Scorecard:  ?

QC WebForm:  ?

QC Script:  ?

QC Shift:  ?

QC Get Record Launch:  ?

QC Show Recording:  ?



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists**
  - Show Lists
  - Add A New List
  - Search For A Lead
  - Add A New Lead
  - Add DNC Number
  - Load New Leads
  - List Custom Fields
  - Copy Custom Fields
  - Drop Lists
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

**Lead Search Options:**

Vendor ID(vendor lead code):	<input type="text"/>	<input type="button" value="SUBMIT"/>
Phone:	<input type="text"/>	<input type="button" value="SUBMIT"/>
Alt. Phone search:	<input type="text" value="No"/>	
Lead ID:	<input type="text"/>	<input type="button" value="SUBMIT"/>
Status:	<input type="text"/>	<input type="button" value="SUBMIT"/>
List ID:	<input type="text"/>	
User:	<input type="text"/>	
Owner:	<input type="text"/>	
First:	<input type="text"/>	<input type="button" value="SUBMIT"/>
Last:	<input type="text"/>	
Email:	<input type="text"/>	<input type="button" value="SUBMIT"/>

**Log Search Options:**

Lead ID:	<input type="text"/>	<input type="button" value="SUBMIT"/>
Phone Dialed:	<input type="text"/>	<input type="button" value="SUBMIT"/>

**Archived Log Search Options:**

Lead ID:	<input type="text"/>	<input type="button" value="SUBMIT"/>
Phone Dialed:	<input type="text"/>	<input type="button" value="SUBMIT"/>

Figure 137. List Search for a Lead

### Add A New Lead

Lead ID: NEW List ID:  GMT offset: CSLR:  
Fronter: Called Count: Last Local Call:

[Turn on archived logs display](#)

Title:	<input type="text"/>	First:	<input type="text"/>
MI:	<input type="text"/>	Last:	<input type="text"/>
Address1 :	<input type="text"/>		
Address2 :	<input type="text"/>		
Address3 :	<input type="text"/>		
City :	<input type="text"/>		
State:	<input type="text"/>	Postal Code:	<input type="text"/>
Province :	<input type="text"/>		
Country:	<input type="text"/>	Date of Birth:	<input type="text"/>
Phone :	<input type="text"/>		
DialCode :	<input type="text"/>		
Alt. Phone :	<input type="text"/>		
Email :	<input type="text"/>		
Show :	<input type="text"/>		
Vendor ID :	<input type="text"/>		
Source ID :	<input type="text"/>		
Rank :	<input type="text"/>		
Owner :	<input type="text"/>		
Comments :	<input type="text"/>		

Figure 138. Add A New Lead

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
  - Show Lists
  - Add A New List
  - Search For A Lead
  - Add A New Lead
  - Add-Delete DNC Number
  - Load New Leads
  - List Custom Fields
  - Copy Custom Fields
  - Drop Lists
- Quality Control
- Scripts
- Filters
  - Inbound
  - User Groups
  - Remote Agents
  - Admin

MODIFY A DROP LIST

Drop List ID: **test\_drop\_list**

Drop List Name:

Last Run Time:

Admin User Group:

Run Server:

Run Times:

Run Weekdays:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Run Month Days:

Duplicate Check:

List ID:  (digits only)

Active:

Gather Minutes:  (digits only)

Run Now Trigger:

Drop Status 1: **DROP** - [REMOVE](#)

Add A Drop Status:  [ADD](#)

Inbound Groups:
 

- AGENTDIRECT - Single Agent Direct Queue
- SALESLINE - Sales inbound

[DELETE THIS DROP LIST](#)

[Click here to see Admin changes to this drop list](#)

Figure 139. Drop Lists

Figure 140. Quality Control Show QC Campaigns

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
  - QC Calls by Campaign
  - QC Calls by List
  - QC Calls by Ingroup
  - Show QC Scorecards
  - Modify QC Codes
- Scripts
- Filters
  - Inbound
  - User Groups
  - Remote Agents
  - Admin

CAMPAIGN TESTCAMP - Quality Control Queue  
QC statuses: SALE, DNC, NI, NP, TD

YOUR CURRENT UNFINISHED QC CALLS (3 records)

QC ID	LEAD ID	NAME	Date Claimed	Date Modified
<a href="#">73</a>	1139564	N P	2021-03-09 15:42:19	2021-03-09 15:42:19
<a href="#">86</a>	273904		2021-03-18 17:33:32	2021-03-18 17:33:32
<a href="#">96</a>	1928575	Test Call	2021-04-01 20:46:22	2021-04-01 20:46:22

DNC	LEAD ID	NAME	CALL DATE	UserID
	<a href="#">865036</a>	Joseph Johnson	2019-07-23 18:39:25	8888
	<a href="#">865036</a>	Joseph Johnson	2019-07-23 18:40:28	8888
	<a href="#">865036</a>	Joseph Johnson	2019-07-23 18:41:35	8888
	<a href="#">798276</a>	Test Lead 3079	2021-03-08 09:43:24	8888

NI	LEAD ID	NAME	CALL DATE	UserID
	<a href="#">808466</a>	Test Lead 11289	2019-05-17 09:39:32	8888
	<a href="#">865036</a>	Joseph Johnson	2019-06-25 14:22:04	8888
	<a href="#">818517</a>	Test Lead 21320	2019-07-11 02:27:30	8888
	<a href="#">798841</a>	Test Lead 1644	2020-09-24 17:10:43	8888
	<a href="#">1922880</a>	Jim Harold	2020-12-14 13:38:25	8888
	<a href="#">273904</a>	No Name	2021-01-27 13:39:25	8888
	<a href="#">798298</a>	Test Lead 3090	2021-03-14 10:51:14	8888
	<a href="#">798366</a>	Test Lead 3169	2021-03-14 10:52:49	8888

NP	LEAD ID	NAME	CALL DATE	UserID
	<a href="#">1139562</a>	No Name	2018-08-06 08:14:43	8888
	<a href="#">1139562</a>	No Name	2018-08-06 08:14:55	8888
	<a href="#">1139562</a>	No Name	2018-08-06 08:15:06	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:31:47	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:32:02	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:32:11	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:32:19	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:39:46	8888
	<a href="#">1139563</a>	John Public	2018-08-06 10:45:48	8888
	<a href="#">1139564</a>	N P	2018-08-06 10:55:08	8888
	<a href="#">1139564</a>	N P	2018-08-06 10:57:13	8888
	<a href="#">1139564</a>	N P	2018-08-06 11:23:42	8888
	<a href="#">1139564</a>	N P	2018-08-09 11:19:24	8888
	<a href="#">1899832</a>	Test Call	2018-08-10 13:01:39	8888
	<a href="#">847301</a>	Test Lead 52104	2018-08-10 14:42:27	8888
	<a href="#">852001</a>	Test Lead 56804	2018-08-10 14:45:00	8888



**ADMINISTRATION**  **QC STATUS CODES WITHIN THIS SYSTEM:** [?](#)

STATUS CODE	DESCRIPTION	QC CATEGORY	MODIFY/DELETE	
KILL	<input type="text" value="Killed Sale"/>	PASS	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>
QCCANCEL	<input type="text" value="CANCEL"/>	CANCEL	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>
QCFAIL	<input type="text" value="FAIL"/>	FAIL	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>
QCNEW	<input type="text" value="QC New customer"/>	PASS	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>
QCPASS	<input type="text" value="PASS"/>	PASS	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>
RETRAIN	<input type="text" value="Agent needs retraining"/>	PASS	<input type="button" value="MODIFY"/>	<a href="#">DELETE</a>

ADD NEW QC STATUS CODE

Status:  Description:  QC Category:

Figure 141. Modify QC Codes

Figure 142. QC Scorecards

**ADMINISTRATION**  **Quality Control Scorecards:**

Scorecard	Checkpoints	Pass/max score	Campaigns	In-groups	Lists	Last modified	Active	
TEST2 - Second test	2	0 / 12	0	1	0	2020-11-20 14:56:15	<input checked="" type="checkbox"/>	<input type="button" value="MODIFY"/> <input type="button" value="DELETE"/>
TESTID - Test scorecard	3	20 / 24	1	0	0	2021-03-19 20:30:36	<input checked="" type="checkbox"/>	<input type="button" value="MODIFY"/> <input type="button" value="DELETE"/>
TESTINGR - Ingroup override scorecard	3	20 / 30	0	1	0	2020-12-18 14:28:15	<input checked="" type="checkbox"/>	<input type="button" value="MODIFY"/> <input type="button" value="DELETE"/>
TESTLIST - List override scorecard	3	8 / 13	0	0	3	2021-03-18 17:28:27	<input checked="" type="checkbox"/>	<input type="button" value="MODIFY"/> <input type="button" value="DELETE"/>

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Show Scripts
- Add A New Script
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin

MODIFY A SCRIPT

Script ID: **DEMO2** ?

Script Name:  (title of the script) ?

Script Comments:

Admin User Group:  ?

Active:  ?

Script Color (color chooser):  ?

Agent Name(fullname)  Insert

```
--A--vendor_lead_code--B--, --A--list_id--B--,
Entry list ID: --A--entry_list_id--B--
Entry Date: --A--entry_date--B--

hello MR <font color=red>--A--first_name--B-- --A--
-last_name--B--</font>

--A--address1--B--
--A--address2--B--
--A--address3--B--
--A--postal_code--B--
--A--preset_number_d--B--

web vars: --A--web_vars--B--

Recording ID: --A--recording_id--B--
Recording Filename: --A--recording_filename--B--

DID ID: --A--did_id--B--
DID Extension: --A--did_extension--B--
```

Script Text: [Preview Script](#)

**CAMPAIGNS USING THIS SCRIPT:**  
[TESTCAMP](#) Test Campaign 1

**IN-GROUPS USING THIS SCRIPT:**

**LIST OVERRIDES USING THIS SCRIPT:**

**USER GROUP OVERRIDES USING THIS SCRIPT:**

[DELETE THIS SCRIPT](#)

[Click here to see Admin changes to this script](#)

**Figure 143. Script Modification Page**



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Show Filters
- Add A New Filter
- Inbound
- User Groups
- Remote Agents
- Admin

MODIFY A FILTER

Filter ID: **LESS\_THAN\_3\_NA\_SPEC1** ?

Filter Name:  (short description of the filter) ?

Filter Comments:  ?

Admin User Group:  ?

Filter SQL:

```
( (called_count > 3) or (
( called_count = 1) and (status IN('A','B','NA'))
and (last_local_call_time < DATE_SUB(NOW(), INTERVAL
2 MINUTE) ) ) or
( (called_count = 2) and (status IN('A','B','NA'))
and (last_local_call_time < DATE_SUB(NOW(), INTERVAL
30 MINUTE) ) ) or
( (called_count = 3) and (status IN('A','B','NA'))
and (last_local_call_time < DATE_SUB(NOW(), INTERVAL
60 MINUTE) ) ) ) )
```

TEST ON CAMPAIGN:

CAMPAIGNS USING THIS FILTER:

[TESTCAMP](#) Test Campaign 1

USERS USING THIS FILTER:

[DELETE THIS FILTER](#)

[Click here to see Admin changes to this filter](#)

Figure 144. Filter Modification Page



ADMINISTRATION		MODIFY AN EMAIL GROUPS RECORD: SALESEMAIL	
Reports		Group ID:	<b>SALESEMAIL</b> ? <b>Not set as allowed in any campaigns!</b>
Users		Group Name:	Sales Email basket ?
Campaigns		Group Color:	pink ?
Lists		Active:	Y ?
Quality Control		In-Group Email Date:	?
Scripts		Admin User Group:	---ALL--- ?
Filters		Web Form:	?
Inbound		Web Form Two:	?
Show In-Groups		Web Form Three:	?
Add A New In-Group		Next Agent Email:	random ?
Copy In-Group		Queue Priority:	0 - Even ?
Show Email Groups		Frontier Display:	Y ?
Add New Email Group		Get Call Launch:	EMAIL ?
Copy Email Group		Group Handling:	EMAIL ?
Show Chat Groups		Script:	- ?
Add New Chat Group		Ignore List Script Override:	N ?
Copy Chat Group		Status Group Override:	NONE ?
Show DIDs		In-Group Recording Override:	DISABLED ?
Add A New DID		In-Group Recording Filename:	NONE ?
Copy DID		Start Email URL:	?
RA Extensions		Dispo Email URL:	?
Show Call Menus			
Add A New Call Menu			
Copy Call Menu			
Filter Phone Groups			
Add Filter Phone Group			
Add-Delete FPG Number			
User Groups			
Remote Agents			
Admin			
			SUBMIT

Figure 146. Inbound Email Group Modification Page

ADMINISTRATION		MODIFY AN CHAT GROUPS RECORD: SALES_CHAT	
Reports		Group ID:	<b>SALES_CHAT</b> ?
Users			<b>Not set as allowed in any campaigns!</b>
Campaigns		Group Name:	Sales Chat ?
Lists		Group Color:	yellow ?
Quality Control		Active:	Y ?
Scripts		In-Group Chat Date:	? ?
Filters		Default List ID:	0 ?
Inbound		Admin User Group:	---ALL--- ?
Show In-Groups		Web Form:	? ?
Add A New In-Group		Web Form Two:	? ?
Copy In-Group		Web Form Three:	? ?
Show Email Groups		Queue Priority:	0 - Even ?
Add New Email Group		Frontier Display:	Y ?
Copy Email Group		Group Handling:	CHAT ?
Show Chat Groups		Status Group Override:	NONE ?
Add New Chat Group		In-Group Recording Override:	DISABLED ?
Copy Chat Group		In-Group Recording Filename:	NONE ?
Show DIDs		Start Chat URL:	? ?
Add A New DID		Dispo Chat URL:	? ?
Copy DID		No Agent Chat URL:	? ?
RA Extensions		Uniqueid Status Display:	DISABLED ?
Show Call Menus		Uniqueid Status Prefix:	? ?
Add A New Call Menu		Customer Chat Screen Colors:	default ?
Copy Call Menu		Customer Chat Survey Link:	? ?
Filter Phone Groups		Customer Chat Survey Text:	? ?
Add Filter Phone Group		Customer Chat Link:	<a href="#">First Link</a> <a href="#">Second Link</a> ?
Add-Delete FPG Number			<input type="button" value="SUBMIT"/>
User Groups			
Remote Agents			
Admin			

Figure 147. Inbound Chat Group Modification Page

ADMINISTRATION

MODIFY DID RECORD: 7275551112

DID: 7275551112

Extension: inbound 2

Description: inbound 2

DID Carrier: VENDOR

Description: VENDOR

Active: Y

Admin User Group: ALL

DID Route: CALLMENU

Record Call: In

Route Answer: In

Extension: 999911112

Extension Context: default

Voicemail Box: voicemail chooser

Phone Extension: test\_mansover

Server IP: test\_mansover

Call Menu: test\_mansover

User Agent: test\_mansover

User Unavailable: EXTEN

Action: test\_mansover

User Route Settings: NONE

In-Group: TRAINING\_INBOUND - Training September 2009 In

In-Group Call Handle: CID

Method: LB

In-Group Search: 999

In-Group List ID: 19

In-Group Entry List ID: 19

In-Group Campaign ID: 1

In-Group Phone Code: 19

Clear CID Number: 19

No Agent In-Group Redirect: NONE

No Agent In-Group Extension: 7275551213

Max Queue In-Group Calls: TEST\_IN3 - TEST inbound 3

Max Queue In-Group Extension: 999999999

Pre-Filter Group ID: 999

Pre-Filter Phone Group DID: 999

Pre-Filter Recent Call DID: DISABLED

Pre-Filter Recent Call DID: DISABLED

Filter Inbound Number: 999

Filter Group ID: 999

Filter URL:

Filter URL: DID

Redirect: Redirect

Filter DTMF: QMS

Campaign: EXTEN

Filter Action: EXTEN

Filter Extension: 999911112

Filter Extension Context: default

Voicemail Box: voicemail chooser

Filter Phone: 999911112

Filter Extension: 999911112

Server IP: 999911112

Filter Call Menu: 999911112

Filter User Agent: 999911112

Filter User Unavailable: VOICEMAIL

Filter User Action: AGENTDIRECT - Single Agent Direct Queue

Settings In-Group: TEST\_IN2 - TEST inbound 2

Filter In-Group Call Handle: CID

Method: LB

Filter In-Group Search: 999

Filter In-Group List ID: 19

Filter In-Group Entry List ID: 19

Filter In-Group Campaign ID: 1

Filter In-Group Phone Code: 19

Custom 1: 999911112

Custom 2: 999911112

Custom 3: 999911112

Custom 4: 999911112

Custom 5: 999911112

SUBMIT

CALL MENUS USING THIS DID:  
CAMPAIGNS USING THIS DID:  
CAMPAIGN AC-CID USING THIS DID:  
CID GROUPS USING THIS DID:  
In-Group Search using here 3 state  
In-Group List ID using here 5 state

IN GROUPS USING THIS DID:  
LISTS USING THIS DID:  
[Click here to see a traffic report for this DID](#)  
[Click here to see a list of recordings and calls for this DID](#)

SEE DID REMOTE AGENT EXTENSION OVERRIDES FOR THIS DID  
[DELETE THIS DID](#)  
[Click here to see Admin changes to this DID](#)

Figure 148. Inbound DID Modification Page

Figure 149. Inbound RA Extensions

ADMINISTRATION

REMOTE AGENT EXTENSION OVERRIDES FOR THIS DID: ?

#	USER START	EXTENSION	DESCRIPTION	ACTIVE	CALLS	DELETE
1	10000	919999999999	test forward	<input checked="" type="checkbox"/>	0	<a href="#">DELETE</a>

[SUBMIT CHANGES](#)

ADD NEW REMOTE AGENT EXTENSION OVERRIDE

User Start:  Extension:

Description:  [ADD](#)

[MODIFY THIS DID](#)

[Click here to see Admin changes to this DID](#)





**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound**
  - Show In-Groups
  - Add A New In-Group
  - Copy In-Group

Modify Filter Phone Group: banned\_inbound\_CIDs

Filter Phone Group ID: **banned\_inbound\_CIDs** ?

Filter Phone Group Name: Banned Inbound phone numbers ?

Filter Phone Group Description: ?

Admin User Group: ---ALL---

SUBMIT

Numbers in this Filter Phone Group: 1

[DELETE THIS FILTER PHONE GROUP](#)

[Click here to download the numbers in this filter phone group.](#)

[Click here to see Admin changes to this filter phone group](#)

**Figure 151. Inbound Filter Phone Groups Modification Page**

**Figure 152. Filter Phone Group Add/Delete Number**

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound**
  - Show In-Groups
  - Add A New In-Group
  - Copy In-Group
  - Show Email Groups
  - Add New Email Group
  - Copy Email Group
  - Show Chat Groups
  - Add New Chat Group
  - Copy Chat Group
  - Show DIDs
  - Add A New DID

ADD OR DELETE NUMBERS FROM THE FILTER PHONE GROUP LIST

Filter Phone Group: banned\_inbound\_CIDs - Banned Inbound phone numbers

Phone Numbers:  
(one phone number per line only) ?

Add or Delete: add

SUBMIT

Download numbers in this list to a file:  
banned\_inbound\_CIDs - Banned Inbound phone numbers SUBMIT

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Leads
- Quality Control
- Scripts
- Files
- Inbound
- User Groups
  - Show User Groups
  - Add A New User Group
  - Group Hours Reset
  - Bulk Group Change
  - Remote Agents
- Admin

MODIFY A USER'S GROUP ENTRY

Group: 7ADMIN (description of group)

Force Timeclock Login: N

Shift Enforcement: OFF

Allowed Campaigns:
 

- ALL-CAMPAIGNS - USERS CAN VIEW ANY CAMPAIGN**
  - 456 - HOSTCCOMM Test Campaign
  - ALTTEST - All dialing test
  - APPTAGNT - Appointments All Agents
  - APPTENG - Appointments English
  - APPTSPA - Appointments Spanish
  - EMALTEST - Inbound email tester
  - INACTIVE - Test inactive campaign
  - JDTEST - JD Test set con email
  - MIKETEST - Bug verification
  - SHIPAGNT - Shipping All Agents
  - SHIPENG - Shipping English
  - SHIFFRE - Shipping French
  - SVYTEST - survey test campaign
  - TEST\_CMP - Test underscore test
  - TEST22 - Campaign used for shared DNC list
  - TEST3 - testing 3
  - TESTCAMP - Test Campaign 1
  - TESTSPC - test with a space

Group Shifts:
 

- 10TOSATURDAY - 10AM to 4PM Saturday shift
- 24MIDNIGHT - 24 hours a day seven days a week split at midnight
- 24HRMIDNIGHT - 24 hours 7 days a week
- 313 - 3T15
- BTOMONDAYFRIDAY - 9AM to 5PM Monday through Friday
- ABC&DEIS - ABC&DEIS
- BC23845 - BC23845
- BTTTEST - Btuh
- logod - logod
- POND - Testing again
- TEST - TEST

Agent Status Viewable Groups:
 

- ALL-GROUPS - All user groups in the system**
- CAMPAIGN-AGENTS - All users logged into the same campaign as the agent**
- NOT-LOGGED-IN-AGENTS - All users in the system, even not logged-in users**
  - 5000 - admin user group test
  - 7457 - 7457
  - 7ADMIN - 7 ADMIN
  - ADMIN - VICIDIAL ADMINISTRATORS
  - AGENTS - VICIDIAL AGENTS
  - APIUSER - APIUSER
  - april - april test
  - atst - email test
  - Example - Conference Example
  - INGROUP-REPORT - Test in-group report limited group
  - INT-TEST-TEESsSTTTMBGG
  - MIKESGROUP - Mikes Group
  - NEWGRP - Test
  - stacy - stacy practicing
  - TEMPTEST - Testing
  - Test - test
  - TEST-GROUP - test group
  - TRAINAGENTS - Training Agents
  - video - video agents 2

Agent Status View Time: N

Agent Call Log View: N

Agent Fullscreen: N

Script Override: NONE

Agent Allow Consultative Xfer: Y

Agent Allow Dial Override Xfer: Y

Agent Allow Voicemail Message Xfer: Y

Agent Allow Blind Xfer: Y

Agent Allow Dial With Customer Xfer: Y

Agent Allow Park Customer Dial Xfer: Y

Agent Allow Park Xfer: Y

Agent Allowed Chat Groups:
 

- ALL-GROUPS - All user groups in the system**
- CAMPAIGN-AGENTS - All users logged into the same campaign as the agent**
  - 5000 - admin user group test
  - 7457 - 7457
  - 7ADMIN - 7 ADMIN
  - ADMIN - VICIDIAL ADMINISTRATORS
  - AGENTS - VICIDIAL AGENTS
  - APIUSER - APIUSER
  - april - april test
  - atst - email test
  - Example - Conference Example
  - INGROUP-REPORT - Test in-group report limited group
  - INT-TEST-TEESsSTTTMBGG
  - MIKESGROUP - Mikes Group
  - NEWGRP - Test
  - stacy - stacy practicing
  - TEMPTEST - Testing
  - Test - test
  - TEST-GROUP - test group
  - TRAINAGENTS - Training Agents
  - video - video agents 2

Allowed Reports:
 

- ALL-REPORTS
- NONE
- Real-Time Main Report
- Real-Time Campaign Summary
- Real-Time Wholesale Report
- VERM Reports
- Inbound Report
- Inbound Report by DID

Allowed Custom Reports:
 

- ALL-REPORTS
- NONE
- 1-month APD report for test campaigns
- 2nd Test report
- 3rd Test report
- Another test reports
- New test report
- VLC Leads Export Report

Allowed Queue Groups:
 

- ALL-GROUPS - USERS CAN VIEW ANY QUEUE GROUP**
  - Test\_all\_camps\_igs - Test all campaigns and in-groups
  - Test\_QG - Test Queue Group 3

Reports Header Override: DISABLED

Home URL Override:

Webphone URL Override:

Webphone System Key Override:

Webphone Dialpad Override: DISABLED

Webphone Layout Override:

QC Allowed Campaigns:
 

- ALL-CAMPAIGNS - USERS CAN QC ANY CAMPAIGN**
  - 456 - HOSTCCOMM Test Campaign
  - ALTTEST - All dialing test
  - APPTAGNT - Appointments All Agents
  - APPTENG - Appointments English
  - APPTSPA - Appointments Spanish
  - EMALTEST - Inbound email tester
  - INACTIVE - Test inactive campaign
  - JDTEST - JD Test set con email
  - MIKETEST - Bug verification
  - SHIPAGNT - Shipping All Agents
  - SHIPENG - Shipping English
  - SHIFFRE - Shipping French
  - SVYTEST - survey test campaign
  - TEST\_CMP - Test underscore test
  - TEST22 - Campaign used for shared DNC list
  - TEST3 - testing 3
  - TESTCAMP - Test Campaign 1
  - TESTSPC - test with a space

QC Allowed Inbound Groups:

**ALL-GROUPS - USERS CAN QC ANY INBOUND GROUP**

- STAY - Testing options
- 123 - enjnt
- 25\_CL\_in - Test 2
- 25SQ\_in - Test 1
- 5001 - Robert 501
- 999999 - 999999
- AAA-ALL-TEST - Alpha test
- ACROUTE\_191 - Area code routing for DID 191
- AFTER\_CALL\_SURVEY - After call survey with SC URL
- AGENTDIRECT\_63 - 63 prefix agentdirect queue
- AGENTDIRECT\_CHAT - Agent Direct Queue for Chats
- AGENTDIRECT9 - always on agentdirect
- AGENTDIRECTchat - testing
- AGENTDIRECTemail - AGENTDIRECT email test
- ALL\_HANGUP - all hangups
- APRILEST - April In-Group Test
- asdfsadfad - adfasfad
- ASK\_AFTERCALL\_SURVEY - Ask then after call survey
- AUDIO\_TEST - Test audio/voice playback
- CALL\_MENU - Callmenu IVR permissions only
- CHAT\_TEST\_GROUP - initial chat test group
- CL\_GALLERIA - TEST inbound gallery
- cpwp - cpwp
- dbNewEmail - DanEmail
- DEV\_EMAIL - Dev test email
- DID\_RECORDING - Controls call settings
- DROP\_APPT\_ENG - Appointments English Drop InGr
- DROP\_APPT\_SPA - Appointments Spanish Drop InGr
- DROP\_SHP\_ENG - Shipping English Drop InGroup
- DROP\_SHP\_FRE - Shipping French Drop InGroup
- EMAIL\_XFER\_TEST - Testing email transfers
- EMAILCOPY - Test ingroup for priority
- EMPLOYEE\_ENTRY - Employee Entry Closed
- export - export report
- INT\_TEST - 1111
- JON\_TEST\_IN\_EMAIL - Jons test email ingroup
- LEADTEST - Testing lead creation
- MIKE\_EMAIL\_MAIL\_BACKED\_UP
- MIKE\_EMAIL\_NEW - Mikes Email Testing
- MIKE\_IN - MIKETEST
- MIKE\_RINGALL - On hook group
- MIKEAGENTDIRECTTEST - AD Testing
- MIKECHAT - Mikes Chatroom
- NAIQUE\_1 - Forced No-Agent-No-Queue 1
- NAIQUE\_2 - Forced No-Agent-No-Queue 2
- NEW\_GROUP\_EXT - New EXT\_GROUP
- NEW\_GROUP\_EXT\_J - New EXT\_GROUP 1
- NEWEMAIL - TEST inbound gallery
- nextavail - ingroup
- REC\_CONTAINER - Holds the call
- SALESLINE - Training Sales Line
- SUPERT - Testing
- TEST\_AFTERHOURS - testing after-hours
- TEST\_DIAL\_INGROUP012 - test dial ingroup max length
- TEST\_EMAIL\_EMPTY - test empty email in-group
- TEST\_ERROR - Testing ERROR in-group
- TEST\_IN - TEST inbound
- TEST\_IN2 - TEST inbound 2
- TEST\_IN3 - TEST inbound 3
- TEST\_IN4 - TEST inbound 4
- TEST\_IN5 - passfhu to test\_menu CM
- TEST\_IN6 - testing copy group
- TEST\_INGROUP\_024567 - Long In-Group ID testing9999999
- TEST\_NOANSWER - test noanswer DROP 1 sec
- TEST\_VM\_DROP - Test Voicemail Drop
- testing - testing
- testtrans - Test Transfers
- TESTTTT - ERROR
- TRAIN\_DID - Training from DID
- TRAINING\_10 - Training May 2010
- TRAINING\_INBOUND - Training September 2009 in
- TRAINING\_MAY\_2012 - Training May 2012 test setup
- video1 - this is a video
- VM\_MESSAGE\_EN - English voicemail message
- VM\_MESSAGE\_ES - Spanish voicemail message
- XML\_FULL - XMLPULL IVR permissions only

Admin IP Whitelist: DISABLED

Agent IP Whitelist: DISABLED

API IP Whitelist: test\_ip\_list

Allowed User Groups:
 

- ALL-GROUPS - All user groups in the system**
  - 5000 - admin user group test
  - 7457 - 7457
  - 7ADMIN - 7 ADMIN
  - ADMIN - VICIDIAL ADMINISTRATORS
  - AGENTS - VICIDIAL AGENTS
  - APIUSER - APIUSER
  - april - april test
  - atst - email test
  - Example - Conference Example
  - INGROUP-REPORT - Test in-group report limited group
  - INT-TEST-TEESsSTTTMBGG
  - MIKESGROUP - Mikes Group
  - NEWGRP - Test
  - stacy - stacy practicing
  - TEMPTEST - Testing
  - Test - test
  - TEST-GROUP - test group
  - TRAINAGENTS - Training Agents
  - video - video agents 2

Allowed Call Times:
 

- ALL-CALLTIMES - All call times in the system**
  - 12am-5pm - default 12pm to 5pm calling
  - 12am-9pm - default 12pm to 9pm calling
  - 24hours - default 24 hours calling
  - 24test - 24 hour test
  - 5pm-9pm - default 5pm to 9pm calling
  - 9am-10pm - 9am-10pm
  - 830to1730 - 8:30am to 5:30pm M-F
  - 8am-5pm - 8am-5pm mon-fri
  - 8am-9pm - 8am to 9pm
  - 95nodefault - 9 to 5 no default
  - 9am-5pm - default 9am to 5pm calling
  - 9am-9pm - default 9am to 9pm calling
  - A&B&B15 - A&B&B15
  - alwaysoff - Always off
  - INT-TEST - Never
  - ios/test - Testing for call time report
  - test/call - test/call time 1
  - test/call - test/call time 2
  - test/ll - TEST

USERS WITHIN THIS USER GROUP: 1

USER	FULL NAME	LEVEL	ACTIVE
800	800	8	Y

Add or Remove In-Group Selected For Active Users in This User Group

add In-Group STAY - Testing

USERS WITHIN THIS SECONDARY USER GROUP: 0

USER	FULL NAME	LEVEL	ACTIVE	USER GROUP
------	-----------	-------	--------	------------

Click here to see all CallBack Holds in this user group

Click here to see the Timeclock Status for this user group

DELETE THIS USER GROUP

Click here to see Admin changes to this user group

Figure 153. User Groups Modification Page



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents**
  - Show Remote Agents
  - Add New Remote Agents
  - Show Extension Groups
  - Add Extension Group
- Admin

MODIFY A REMOTE AGENTS ENTRY: 1

User ID Start: 10000 (numbers only, incremented, must be an existing vicidial user) ?

Number of Lines: 1 (numbers only) ?

Server IP: 10.10.10.15 ?

External Extension: 8300 (dial plan number dialed to reach agents) ?

Extension Group: NONE ?

Status: INACTIVE ?

Campaign: TESTCAMP ?

On-Hook Agent: N ?

On-Hook Ring Time: 15 ?

Inbound Groups:

- [AGENTDIRECT](#) - Single Agent Direct Queue - 99
- [AGENTDIRECT\\_CHAT](#) - Agent Direct Queue for Chats - 99
- [SALES\\_CHAT](#) - Sales Chat - 0
- [SALESEMAIL](#) - Sales Email basket - 0
- [SALESLINE](#) - Sales inbound - 0

NOTE: It can take up to 30 seconds for changes submitted on this screen to go live

[THERE ARE 1 DID REMOTE AGENT EXTENSION OVERRIDES FOR THIS REMOTE AGENT](#)

[DELETE THIS REMOTE AGENT](#)

[Click here to see Admin changes to this remote agent](#)

**Figure 154. Remote Agent Modification Page**

**Figure 155. Remote Agent Show Extension Groups Page**

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents**
  - Show Remote Agents
  - Add New Remote Agents
  - Show Extension Groups
  - Add Extension Group
- Admin

MODIFY AN EXTENSION GROUP ENTRY: 1

Extension Group: 101 (no spaces) ?

Extension: 101 (numbers only) ?

Rank: 0 ?

Campaigns Groups: TESTCAMP (pipe-delimited list) ?

Call Count Today: 0

Last Call Time:

Last Call ID:

[DELETE THIS EXTENSION GROUP ENTRY](#)

[Click here to see Admin changes to this extension group entry](#)

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - VM Message Groups
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists
  - Queue Groups

MODIFY A CALL TIME

Call Time ID: **24test**

Call Time Name:  (short description of the call time)

Call Time Comments:

Admin User Group:

Default Start: <input type="text" value="0"/>	Default Stop: <input type="text" value="2400"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Sunday Start: <input type="text" value="0"/>	Sunday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Monday Start: <input type="text" value="0"/>	Monday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Tuesday Start: <input type="text" value="0"/>	Tuesday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Wednesday Start: <input type="text" value="0"/>	Wednesday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Thursday Start: <input type="text" value="0"/>	Thursday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Friday Start: <input type="text" value="0"/>	Friday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>
Saturday Start: <input type="text" value="0"/>	Saturday Stop: <input type="text" value="0"/>	AH Override: <input type="text"/>	<a href="#">audio chooser</a>

Active State Call Time Definitions for this Record:

Add state call time rule:

Active Holiday Definitions for this Record:

<a href="#">labor_day_2021 - REMOVE</a>	2021-09-06 - Labor Day 2021
<a href="#">veterans_day_2021 - REMOVE</a>	2021-11-11 - Veterans Day 2021
<a href="#">thanksgiving_2021 - REMOVE</a>	2021-11-25 - Thanksgiving 2021
<a href="#">newyears_eve_2021 - REMOVE</a>	2021-12-31 - New Years Eve 2021
<a href="#">xmas_2021 - REMOVE</a>	2021-12-25 - Christmas 2021
<a href="#">newyear_2022 - REMOVE</a>	2022-01-01 - New Year 2022
<a href="#">mlk_2022 - REMOVE</a>	2022-01-17 - MLK Jr Day 2022
<a href="#">presidents_2022 - REMOVE</a>	2022-02-21 - Presidents Day 2022
<a href="#">eastermonday_2022 - REMOVE</a>	2022-04-18 - Easter Monday 2022
<a href="#">memorial_day_2022 - REMOVE</a>	2022-05-30 - Memorial Day 2022
<a href="#">july_4th_2022 - REMOVE</a>	2022-07-04 - 4th of July 2022
<a href="#">labor_day_2022 - REMOVE</a>	2022-09-05 - labor Day 2022
<a href="#">veterans_day_2022 - REMOVE</a>	2022-11-11 - Veterans Day 2022
<a href="#">thanksgiving_2022 - REMOVE</a>	2022-11-24 - Thanksgiving 2022
<a href="#">christmas_day_2022 - REMOVE</a>	2022-12-25 - Christmas Day 2022
<a href="#">newyears_day_2023 - REMOVE</a>	2023-01-01 - New Years Day 2023
<a href="#">mlk_day_2023 - REMOVE</a>	2023-01-16 - Martin Luther King Jr Day 2023

Add holiday rule:

**CAMPAIGNS USING THIS CALL TIME:**

- [TESTCAMP](#) Test Campaign 1
- [ALTTST](#) Alt dialing test
- [TEST3](#) testing 3
- [EMAILTST](#) Inbound email tester
- [TESTSPC](#) test with a space
- [TEST22](#) Campaign used for shared DNC list
- [TEST\\_CMP](#) Test underscore test

**INBOUND GROUPS USING THIS CALL TIME:**

- [TEST\\_IN4](#) TEST inbound 4
- [AGENTDIRECT9](#) always on agentdirect
- [TEST\\_IN6](#) testing copy group

**CALL MENUS USING THIS CALL TIME:**

**LISTS SET TO THIS CALL TIME:**

[DELETE THIS CALL TIME DEFINITION](#)

[Click here to see Admin changes to this call time](#)

Figure 156. Admin Call Times Modification Page

**ADMINISTRATION**

- Reports
- Users
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- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts

MODIFY A SHIFT

Shift ID: **M-F\_9am5pm**

Shift Name:  (short description of the shift) ?

Admin User Group:  ?

Shift Start Time:  Shift End Time:   ?

Shift Length:  ?

Shift Weekdays: ?

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Report Option:  ?

Report Rank:  ?

**USER GROUPS USING THIS SHIFT:**

[DELETE THIS SHIFT DEFINITION](#)

[Click here to see Admin changes to this shift](#)

**Figure 157. Admin Shifts Modification Page**





**ADMINISTRATION**

- Reports
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- Campaigns
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- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
  - Call Times
  - Shifts
  - Phones
  - Templates

MODIFY A PHONE ALIAS RECORD: a101

Alias ID: **a101** ?

Alias Name:  ?

Admin User Group:  ?

Phones Logins List:  (comma separated) ?

**PHONES WITHIN THIS PHONES ALIAS:**

LOGIN	EXTENSION	SERVER	PROTOCOL	IP
<a href="#">100</a>	cc100	10.10.10.15	SIP	
<a href="#">101</a>	cc101	10.10.10.15	SIP	

[DELETE THIS PHONE ALIAS](#)

[Click here to see Admin changes to this phone alias](#)

Figure 159. Admin Phones Alias Page

Figure 160. Admin Phones Group Alias Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
  - Call Times
  - Shifts
  - Phones
  - Templates

MODIFY A GROUP ALIAS RECORD: MAIN\_OFFICE

Group Alias ID: **MAIN\_OFFICE** ?

Group Alias Name:  ?

Admin User Group:  ?

CallerID Number:  ?

CallerID Name:  ?

Active:

[DELETE THIS GROUP ALIAS](#)

[Click here to see Admin changes to this group alias](#)

**ADMINISTRATION**

- Reports
- Users
- Campaigns
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- Inbound
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- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses

MODIFY A CONF TEMPLATE RECORD: WebRTC

Template ID: **WebRTC**

Template Name:

Admin User Group:

Template Contents: 

```
type=friend
host=dynamic
encryption=yes
icesupport=yes
directmedia=no
transport=wss
dtlsenable=yes
dtlsverify=no
dtlscertfile=/etc/asterisk/keys/vicihost.crt
dtlsprivatekey=/etc/asterisk/keys/vicihost.key
dtlssetup=actpass
rtcp_mux=yes
```

**PHONES USING THIS CONF TEMPLATE:**

EXTENSION	NAME	SERVER	ACTIVE

**CARRIERS USING THIS CONF TEMPLATE:**

CARRIER	NAME	SERVER	ACTIVE

[DELETE THIS CONF TEMPLATE](#)

[Click here to see Admin changes to this conf template](#)

Figure 161. Admin Template Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
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  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY A CARRIER RECORD: SIPEXAMPLE

Carrier ID:	SIPEXAMPLE
Carrier Name:	TEST SIP carrier example
Carrier Description:	
Admin User Group:	--ALL--
Registration String:	register => testcarrier:test@10.10.10.15:5060
Template ID:	--NONE--
Account Entry:	<pre>[testcarrier] disallow=all allow=ulaw type=friend username=testcarrier secret=test host=dynamic dtmfmode=rfc2833 context=trunkinbound</pre>
Protocol:	SIP
Globals String:	TESTSIPTRUNK = SIP/testcarrier
Dialplan Entry:	<pre>exten =&gt; _91999XXXXXX,1,AGI(agi://127.0.0.1:4577/call_log) exten =&gt; _91999XXXXXX,2,Dial(\${TESTSIPTRUNK}/\${EXTEN:2},,To) exten =&gt; _91999XXXXXX,3,Hangup</pre>
Server IP:	10.10.10.15 (0.0.0.0 is all servers)
Active:	N

[DELETE THIS CARRIER](#)  
[Click here to see Admin changes to this carrier](#)

Figure 162. Admin Carriers Modification Page





**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings

MODIFY AN AGENT CONFERENCE RECORD: 8600051

Conference:  ?

Server IP:  ?

Current Extension:

[DELETE THIS AGENT CONFERENCE](#)

Figure 164. Admin Conferences Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
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- Scripts
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- Inbound
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- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - VM Message Groups
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY SCREEN LABEL: TEST\_LABEL

Label ID: **TEST\_LABEL**

Label Name:  ?

Active:  Y ?

Admin User Group:  ?

Hide Label in Call Logs:  Y ?

Label Title:  ?

Label First Name:  ?

Label Middle Initial:  ?

Label Last Name:  ?

Label Address1:  ?

Label Address2:  ?

Label Address3:  ?

Label City:  ?

Label State:  ?

Label Province:  ?

Label Postal Code:  ?

Label Vendor Lead Code:  ?

Label Gender:  ?

Label Phone Number:  ?

Label Phone Code:  ?

Label Alt Phone:  ?

Label Security Phrase:  ?

Label Email:  ?

Label Comments:  ?

Label Lead ID:  ?

Label List ID:  ?

Label Entry Date:  ?

Label Timezone:  ?

Label Source ID:  ?

Label Reset Code:  ?

Label Status:  ?

Label User:  ?

Label Date of Birth:  ?

Label Country Code:  ?

Label Last Call:  ?

Label Called Count:  ?

Label Rank:  ?

Label Owner:  ?

Label Entry List ID:  ?

**CAMPAIGNS USING THIS SCREEN LABEL:**

[DELETE THIS SCREEN LABEL](#)

[Click here to see Admin changes to this screen label](#)

**Figure 165. Admin Screen Label Modification Page**

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
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- Inbound
- User Groups
- Remote Agents
- Admin**
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

STUSES WITHIN THIS SYSTEM: ?

STATUS	DESCRIPTION	CATEGORY	AGENT SELECTABLE										MIN SEC	MAX SEC	MODIFY/DELETE	
			AGENT SELECTABLE	HUMAN ANSWER	SALE	DNC	CUSTOMER CONTACT	NOT INTERESTED	UNWORKABLE	SCHEDULED CALLBACK	COMPLETED	ANSWERING MACHINE			MODIFY	DELETE
A	Answering Machine	UNDEFINED - Default Category	Y	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AA	Answering Machine Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AB	Busy Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
ADC	Disconnected Number Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	Y	N	N	0	0	MODIFY	DELETE
ADCT	Disconnected Number Temp	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AFAX	Fax Machine Auto	UNDEFINED - Default Category	N	N	N	N	N	N	N	Y	N	N	0	0	MODIFY	DELETE
AFTHRS	Inbound After Hours Drop	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
AL	Answering Machine Msg Pla	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	Y	0	0	MODIFY	DELETE
AM	Answering Machine SentTo	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	Y	0	0	MODIFY	DELETE
B	Busy	UNDEFINED - Default Category	Y	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
CALLBK	Call Back	UNDEFINED - Default Category	Y	Y	N	N	Y	N	N	Y	N	N	0	0	MODIFY	DELETE
CBHOLD	Call Back Hold	UNDEFINED - Default Category	N	Y	N	N	Y	N	N	Y	N	N	0	0	MODIFY	DELETE
DC	Disconnected Number	UNDEFINED - Default Category	Y	N	N	N	N	N	Y	N	N	N	0	0	MODIFY	DELETE
DEC	Declined Sale	UNDEFINED - Default Category	Y	Y	N	N	Y	N	N	N	N	N	0	0	MODIFY	DELETE
DNC	DO NOT CALL	UNDEFINED - Default Category	Y	Y	N	Y	N	N	N	N	Y	N	0	0	MODIFY	DELETE
DNCC	DO NOT CALL Hopper Cam	UNDEFINED - Default Category	N	N	N	Y	N	N	N	N	Y	N	0	0	MODIFY	DELETE
DNCL	DO NOT CALL Hopper Sys f	UNDEFINED - Default Category	N	N	N	Y	N	N	N	N	Y	N	0	0	MODIFY	DELETE
DROP	Agent Not Available	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
ERI	Agent Error	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
INCALL	Lead Being Called	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
VRXFR	Outbound drop to Call Menu	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
LRERR	Outbound Local Channel Re	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
LSMERG	Agent lead search old lead n	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
MAXCAL	Inbound Max Calls Drop	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
MLINAT	Multi-Lead auto-alt set inactv	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	Y	0	0	MODIFY	DELETE
N	No Answer	UNDEFINED - Default Category	Y	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
NA	No Answer AutoDial	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
NANQUE	Inbound No Agent No Queue	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
NEW	New Lead	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
NI	Not Interested	UNDEFINED - Default Category	Y	Y	N	N	Y	Y	N	N	N	N	0	0	MODIFY	DELETE
NP	No Pitch No Price	UNDEFINED - Default Category	Y	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
PDROP	Outbound Pre-Routing Drop	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
PM	Played Message	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
PU	Call Picked Up	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
QCFAIL	QC_FAIL_CALLBK	QC -	N	Y	N	N	Y	N	N	Y	N	N	0	0	MODIFY	DELETE
QUEUE	Lead To Be Called	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
QVMAIL	Queue Abandon Voicemail L	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
ROXFER	Re-Queue	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
SALE	Sale Made	SALES - Sales statuses	Y	Y	Y	N	N	N	N	N	Y	N	0	0	MODIFY	DELETE
SVYCLM	Survey sent to Call Menu	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
SVYEXT	Survey sent to Extension	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
SVYHU	Survey Hungup	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
SVYREC	Survey sent to Record	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
SVYVM	Survey sent to Voicemail	UNDEFINED - Default Category	N	N	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
TIMEOT	Inbound Queue Timeout Dro	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
XDROP	Agent Not Available IN	UNDEFINED - Default Category	N	Y	N	N	N	N	N	N	N	N	0	0	MODIFY	DELETE
XFER	Call Transferred	UNDEFINED - Default Category	Y	Y	N	N	Y	N	N	N	N	N	0	0	MODIFY	DELETE

ADD NEW SYSTEM STATUS

Status:  Description:  Selectable:  Human Answer:

Sale:  DNC:  Customer Contact:  Not Interested:

Unworkable:  Callback:  Completed:  Answering Machine:  Category: UNDEFINED - Default Category

Figure 166. Admin System Statuses Modification Page

**ADMINISTRATION**

MODIFY SCREEN COLORS: agent\_blue

Colors ID: **agent\_blue**

Colors Name: Agent blue default ?

Active: Y ?

Admin User Group: ---ALL---

Menu Background (color chooser): 015B91 ?

Frame Background (color chooser): D9E6FE ?

Standard Row 1 Background (color chooser): 9BB9FB ?

Standard Row 2 Background (color chooser): B9CBFD ?

Standard Row 3 Background (color chooser): 8EBCFD ?

Standard Row 4 Background (color chooser): B6D3FC ?

Standard Row 5 Background (color chooser): FFFFFFFF ?

Alternate Row 1 Background (color chooser): BDFFBF ?

Alternate Row 2 Background (color chooser): 99FF99 ?

Alternate Row 3 Background (color chooser): CCFECC ?

Web Logo: default\_new ?

Button Color (color chooser): EFEFEF ?

**SUBMIT**

[DELETE THIS SCREEN COLORS ENTRY](#)

[Click here to see Admin changes to this screen colors entry.](#)




Figure 167. Admin Screen Colors Modification Page

**ADMINISTRATION**

- Reports
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  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups**
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY STATUS GROUP: alt\_list\_statuses

Status Group ID: **alt\_list\_statuses**

Status Group Notes: Alternate List statuses

Admin User Group: ---ALL---

			AGENT SELECTABLE	HUMAN ANSWER	SALE	DNC	CUSTOMER CONTACT	NOT INTERESTED	UNWORKABLE	SCHEDULED CALLBACK	COMPLETED	ANSWERING MACHINE		
STATUS	DESCRIPTION	CATEGORY	Y	Y	Y	N	Y	N	N	Y	N	MIN SEC	MAX SEC	MODIFY/DELETE
SALES	Alternate sale	SALES - Sales statuses	Y	Y	Y	N	Y	N	N	Y	N	0	0	<input type="button" value="MODIFY"/> <input type="button" value="DELETE"/>

**ADD NEW CUSTOM CAMPAIGN STATUS**

Status:  Description:  Selectable: Y  Human Answer: N

Sale: N  DNC: N  Customer Contact: N  Not Interested: N

Unworkable: N  Callback: N  Completed: N  Answering Machine: N  Category: SALES - Sales statuses

**IN-GROUPS USING THIS STATUS GROUP:**

**LISTS USING THIS STATUS GROUP:**

[DELETE THIS STATUS GROUP](#)

[Click here to see Admin changes to this status group](#)

Figure 168. Status Groups Modification Page

- ADMINISTRATION**
- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
- Call Times
- Shifts
- Phones
- Templates
- Carriers
- Servers
- Conferences
- System Settings
- Screen Labels
- Screen Colors
- System Statuses
- Status Groups
- CID Groups**
- Voicemail
- Email Accounts
- Audio Store
- Music On Hold
- Languages
- Audio Soundboards
- VM Message Groups
- Text To Speech
- CallCard Admin
- Contacts
- Settings Containers
- Automated Reports
- IP Lists
- Queue Groups

MODIFY CID GROUP: NO\_GEO\_LIST

CID Group ID: **NO\_GEO\_LIST**

CID Group Notes:  ?

CID Group Type: **NONE** ?

Admin User Group:  ?

CID Auto Rotate Minutes:  ?

CID Auto Rotate Minimum:  ?

CID Auto Rotate Calls, CID and Time: **0 - 9993334443 - 2022-03-12 10:59:02** ?  
[Skip and NOROTATE current CID](#)

**SUBMIT**

CIDS FOR THIS CID GROUP: ?

#	NONE	CID NUMBER	DESCRIPTION	ACTIVE <small><a href="#">select all</a></small>	CALLS	DELETE
1	NONE	<a href="#">8887776666</a>	<input type="text" value="20220312100502"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
2	NONE	9992223331	<input type="text" value="NOROTATE"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
3	NONE	9992223332	<input type="text" value="NOROTATE"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
4	NONE	9992223333	<input type="text" value="20201208104601"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
5	NONE	9992223334	<input type="text" value="20201208105201"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
6	NONE	9993334441	<input type="text" value="20220312103101"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
7	NONE	9993334442	<input type="text" value="20220312105302"/>	<input type="checkbox"/>	0	<a href="#">DELETE</a>
8	NONE	9993334443	<input type="text" value="20220312105901"/>	<input checked="" type="checkbox"/>	0	<a href="#">DELETE</a>

**SUBMIT CHANGES**

ADD NEW NONE CID

Outbound CID:

Description:  **ADD**

CAMPAIGNS USING THIS CID GROUP:

- [TEST3](#) testing 3
- [EMAILTST](#) Inbound email tester

LISTS USING THIS CID GROUP:

- [999886](#) test list

[DELETE THIS CID GROUP](#)

[Click here to see Admin changes to this CID GROUP](#)

[Click here to download this CID GROUP](#)

Figure 169. CID Groups Modification Page



ADMINISTRATION	
<ul style="list-style-type: none"> <li>Reports</li> <li>Users</li> <li>Campaigns</li> <li>Lists</li> <li>Quality Control</li> <li>Scripts</li> <li>Filters</li> <li>Inbound</li> <li>User Groups</li> <li>Remote Agents</li> <li><b>Admin</b> <ul style="list-style-type: none"> <li>Call Times</li> <li>Shifts</li> <li>Phones</li> <li>Templates</li> <li>Carriers</li> <li>Servers</li> <li>Conferences</li> <li>System Settings</li> <li>Screen Labels</li> </ul> </li> </ul>	<p>MODIFY A VOICEMAIL BOX: 8101</p> <p>Voicemail ID: <b>8101</b></p> <p>Password: <input type="text" value="8101"/> ?</p> <p>Name: <input type="text" value="sample voicemail box"/> ?</p> <p>Email: <input type="text"/> ?</p> <p>Active: Y ?</p> <p>Admin User Group: ---ALL--- ?</p> <p>Delete Voicemail After Email: N ?</p> <p>Show VM on Summary Screen: N ?</p> <p>Voicemail Greeting: <input type="text"/> <a href="#">audio chooser</a> ?</p> <p>Voicemail Zone: eastern ?</p> <p>Voicemail Options: <input type="text"/> ?</p> <p>New Messages: 0</p> <p>Old Messages: 0</p> <p style="text-align: center;"><input type="button" value="SUBMIT"/></p> <p style="text-align: center;"><a href="#">DELETE THIS VOICEMAIL BOX</a></p> <p style="text-align: center;"><a href="#">Click here to see Admin changes to this voicemail box</a></p>

Figure 170. Admin Voicemail Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts**
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - IP Lists

UPDATE AN EXISTING INBOUND EMAIL ACCOUNT

Email Account ID: **test\_email** ?

Email Account Name:  ?

Active: **N** ?

Email Account Description:  ?

Email Account Type: **INBOUND** ?

Admin User Group: **All Admin User Groups** ?

Email Account Protocol: **IMAP** ?

Auth Mode for POP3 protocol only: **BEST** ?

Email Reply-to Address:  ?

Email Account Server:  ?

Email Account User:  ?

Email Account Password:  ?

Email Frequency Check Rate (mins): **5** ?

In-Group ID: **SALESEMAIL** ?

Default List ID:  ?

In-Group Call Handle Method: **EMAIL** ?

In-Group Agent Search Method: **LB** ?

In-Group List ID:  ?

In-Group Campaign ID: **TESTCAMP** ?

Un-handled Emails: **0**

[Click here to see Admin changes to this record.](#)

[DELETE EMAIL ACCOUNT](#)

runtime: 0 seconds    Version: 2.14-18    Build: 180502-2215

**Figure 171. Admin Email Accounts Modification Page**



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
- Call Times

Audio File to Upload:  No file chosen ?

Audio Store- VERSION: 2.14-22 BUILD: 170630-1440

We STRONGLY recommend uploading only 16bit Mono 8k PCM WAV audio files(.wav)

All spaces will be stripped from uploaded audio file names

audio file list

#	FILENAME	DATE	SIZE	PLAY
1	<a href="#">this_number_press1_other_number_press2.wav</a>	2018-07-11 09:57:06	147044	<a href="#">PLAY</a>
2	<a href="#">to_receive_call_back_press1.wav</a>	2018-07-11 09:57:06	178776	<a href="#">PLAY</a>
3	<a href="#">thanks_we_will_call_you_back_ct2.wav</a>	2018-07-11 09:57:06	76882	<a href="#">PLAY</a>
4	<a href="#">please_enter_your_number.wav</a>	2018-07-11 09:57:06	189800	<a href="#">PLAY</a>
5	<a href="#">invalid_number.wav</a>	2018-07-11 09:57:06	75876	<a href="#">PLAY</a>
6	<a href="#">thanks_we_will_call_you_back.wav</a>	2018-07-11 09:57:06	141868	<a href="#">PLAY</a>
7	<a href="#">thanks_you_entered.wav</a>	2018-07-11 09:57:06	30288	<a href="#">PLAY</a>
8	<a href="#">error_transfer.wav</a>	2018-07-11 09:57:06	143836	<a href="#">PLAY</a>
9	<a href="#">ok_lets_try_again.wav</a>	2018-07-11 09:57:06	45064	<a href="#">PLAY</a>
10	<a href="#">you_are_calling_from.wav</a>	2018-07-11 09:57:06	40144	<a href="#">PLAY</a>
11	<a href="#">press1_to_confirm_press2_to_reenter.wav</a>	2018-07-11 09:57:06	116232	<a href="#">PLAY</a>
12	<a href="#">thanks_we_will_call_you_back_ct1.wav</a>	2018-07-11 09:57:06	78250	<a href="#">PLAY</a>
13	<a href="#">survey_thankyou_goodbye.wav</a>	2017-08-16 22:28:25	49904	<a href="#">PLAY</a>
14	<a href="#">survey_recommend_press_12.wav</a>	2017-08-16 22:28:21	135040	<a href="#">PLAY</a>
15	<a href="#">survey_satisfied_press_12345.wav</a>	2017-08-16 22:28:18	250222	<a href="#">PLAY</a>
16	<a href="#">survey_willing_press_1.wav</a>	2017-08-16 22:28:14	69118	<a href="#">PLAY</a>
17	<a href="#">SPP_283_05_ends.wav</a>	2017-06-02 10:43:49	99480	<a href="#">PLAY</a>
18	<a href="#">aok_by_freizeichenmk.wav</a>	2017-02-24 19:15:24	1166968	<a href="#">PLAY</a>
19	<a href="#">SPP_275_07_end.wav</a>	2017-02-03 08:15:09	102572	<a href="#">PLAY</a>
20	<a href="#">SPP_276_04_end.wav</a>	2017-02-03 08:11:01	104742	<a href="#">PLAY</a>
21	<a href="#">SPP_276_03_stpete.wav</a>	2017-02-03 08:10:58	247612	<a href="#">PLAY</a>
22	<a href="#">SPP_276_02_cd13.wav</a>	2017-02-03 08:10:53	238346	<a href="#">PLAY</a>
23	<a href="#">SPP_276_01_intro_penny.wav</a>	2017-02-03 08:10:47	248318	<a href="#">PLAY</a>
24	<a href="#">chopin-selection-35minutes.pcm</a>	2017-01-04 08:19:12	3449061	<a href="#">PLAY</a>

Figure 172. Admin Audio Store List Page

Figure 173. Admin Music on Hold Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
- Call Times

MODIFY A MUSIC ON HOLD RECORD: new\_chopin\_35min

Music On Hold ID: **new\_chopin\_35min**

Music On Hold Name:  ?

Admin User Group:  ?

Active:  ?

Random Order:  ?

Audio Files: Rank:  **chopin-selection-35minutes** - [DELETE](#)

Add An Audio File:  [audio chooser](#) ?

[DELETE MUSIC ON HOLD ENTRY](#)

[Click here to see Admin changes to this Music On Hold entry](#)

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
    - Audio Soundboards
    - Text To Speech
    - CallCard Admin
    - Contacts
    - Settings Containers
    - IP Lists

MODIFY A LANGUAGE RECORD: new\_spanish

Language ID: **new\_spanish**

Last Modified: 2019-03-18 21:20:27

Language Description: Spanish 2019

Language Code: es

Admin User Group: ---ALL---

Active: N

Phrases: 8210 Not Translated: 0 [display all](#) | [not translated only](#) | [translated only](#)

ALL PHRASES

I	ID	user	last modified	delete phrase
1	ID: 1	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
Call Not Found: llamada no encontrado: <a href="#">edit</a>				
2	ID: 2	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
Invalid Call ID: inválida Identificación de llamadas: <a href="#">edit</a>				
3	ID: 3	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
Invalid Username/Password: No válida Nombre de usuario / Contraseña: <a href="#">edit</a>				
4	ID: 4	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
DONE: %1s match found, %2s email sent using %3s with %4s status hecho: % 1s coincidencia encontrada, % 2s email enviado usando % 3s con % 4s estado <a href="#">edit</a>				
5	ID: 5	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
DONE: problem with settings %1s, not all required fields filled in hecho: un problema con la configuración de % 1s, no todos los campos obligatorios rellenos <a href="#">edit</a>				
6	ID: 6	user: 6666	last modified: 2019-03-18 21:20:55	<a href="#">delete phrase</a>
DONE: no settings container found %1s				

Add A New Language Phrase:

[SUBMIT CHANGES](#)   [RELOAD PAGE](#)

[DELETE LANGUAGE ENTRY](#)

[Click here to see Admin changes to this Language entry](#)

runtime: 0 seconds   Version: 2.14-11   Build: 170409-1547

Figure 174. Admin Languages Modification Page

**ADMINISTRATION**

- Home
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Followed
- User Groups
- Remote Agents
- Admin
- Call Times
- Drifts
- Phones
- Templates
- Games
- Services
- Conferences
- System Settings
- System Labels
- System Status
- System Statuses
- System Groups
- System Vendors
- Email Accounts
- Audio Files
- Webhooks
- Languges
- Audio Soundboards
- Text To Speech
- CallLog Admin
- Contacts
- Settings Containers
- API Logs

MODIFY A SOUNDBOARD RECORD: customer\_order\_test

Soundboard ID: **customer\_order\_test**

Soundboard Name: Outbound Customers Soundboard

Soundboard Notes:

Soundboard API User: 6666

Soundboard API Pass: \*\*\*\*

Active:

Audio Functions: PLAY-STOP-RESTART

Audio Display: NAME-RENUMBERERS

Layout: column1 Columns Limit: 5

Admin User Group: --All--

FILENAME	RANK	HORZ	type	FONT	level	add	name	
<b>1. column1</b>								
1. ding	1	1	button	2	2		Name: OPENING	- DELETE
2. buzz	2	1	button	2	2		Name: Hello	- DELETE
3. beep	3	1	button	2	2		Name: Good Morning	- DELETE
4. crash	4	1	button	2	2		Name: Good Evening	- DELETE
5. feet	5	1	button	2	2		Name: Good Afternoon	- DELETE
6. snow	6	1	button	2	2		Name: RECORD CALL	- DELETE
7. clear	7	1	button	2	2		Name: FIND ADULT	- DELETE
8. bifs	8	1	button	2	2		Name: Whing person	- DELETE
9. fast	9	1	button	2	2		Name: RESCHEDULE	- DELETE
10. ping	10	1	button	2	2		Name: CALL ME BACK	- DELETE
<b>2. column2</b>								
1. ding	1	1	space	2	2		Name: OPENING 2	- DELETE
2. buzz	2	1	button	2	2		Name: MAAM - OPEN	- DELETE
3. feet	3	1	button	2	2		Name: MAAM - REPEAT	- DELETE
4. show	4	1	space	2	2		Name: MAAM - SHORT	- DELETE
5. clear	5	1	button	2	2		Name: "	- DELETE
6. fast	6	1	button	2	2		Name: SIR - OPEN	- DELETE
7. call	7	1	button	2	2		Name: SIR - REPEAT	- DELETE
8. ping	8	1	space	2	2		Name: SIR - SHORT	- DELETE
9. up	9	1	button	2	2		Name: "	- DELETE
10. ping	10	1	button	2	2		Name: WHO ARE YOU?	- DELETE
11. ping	11	1	button	2	2		Name: Using Computer	- DELETE
<b>3. column3</b>								
1. snow	1	1	button	2	2		Name: ASK FOR ORDER	- DELETE
2. ping	2	1	button	2	2		Name: YES RECORDER	- DELETE
3. up	3	1	button	2	2		Name: FULL PLAN	- DELETE
4. ding	4	1	button	2	2		Name: BASIC PLAN	- DELETE
5. buzz	5	1	button	2	2		Name: ONE-TIME-ONLY	- DELETE
6. fast	6	1	button	2	2		Name: SAMPLE PAK	- DELETE
7. clear	7	1	button	2	2		Name: FINAL ASK - TRIAL	- DELETE
8. fast	8	1	button	2	2		Name: INFOPEACE ASK	- DELETE
9. fast	9	1	button	2	2		Name: YES TO INFOPEACE	- DELETE
<b>4. column4</b>								
1. snow	1	1	button	2	2		Name: RESULTS	- DELETE
2. fast	2	1	button	2	2		Name: Items Mail Only	- DELETE
3. clear	3	1	button	2	2		Name: Husband - Wife Do It	- DELETE
4. buzz	4	1	button	2	2		Name: How Does This Work	- DELETE
5. feet	5	1	button	2	2		Name: How Much Time	- DELETE
6. ping	6	1	button	2	2		Name: NAME OF GROUP	- DELETE
7. ding	7	1	button	2	2		Name: Did This Already	- DELETE
8. up	8	1	button	2	2		Name: Care to Different	- DELETE
9. up	9	1	button	2	2		Name: Count on Your Support	- DELETE
<b>5. column5</b>								
1. ping	1	1	button	2	2		Name: Q and A	- DELETE
2. ping	2	1	button	2	2		Name: 800 number	- DELETE
3. fast	3	1	button	2	2		Name: Customer needed	- DELETE
4. up	4	1	button	2	2		Name: I am in Training	- DELETE
5. clear	5	1	button	2	2		Name: QUICK LEAVE	- DELETE
6. fast	6	1	button	2	2		Name: Supported Programs	- DELETE
7. pop	7	1	button	2	2		Name: Order Status	- DELETE
8. fast	8	1	button	2	2		Name: STATE - NATION	- DELETE
9. high	9	1	button	2	2		Name: Return question	- DELETE
10. or	10	1	button	2	2		Name: Who is this?	- DELETE
11. bar	11	1	button	2	2		Name: Where are you located?	- DELETE
12. bifs	12	1	button	2	2		Name: Company name	- DELETE
13. ship	13	1	button	2	2		Name: Website	- DELETE
14. male	14	1	button	2	2		Name: President	- DELETE
15. speed	15	1	button	2	2		Name: How did you get my #	- DELETE
<b>6. column_b1</b>								
1. ping	1	1	space	2	2		Name: Q and A	- DELETE
2. pop	2	1	button	2	2		Name: Uh-huh	- DELETE
3. buzz	3	1	button	2	2		Name: Okay	- DELETE
4. ding	4	1	button	2	2		Name: Repeat that	- DELETE
5. clear	5	1	button	2	2		Name: Thank you	- DELETE
<b>7. column_b2</b>								
1. ping	1	1	button	2	2		Name: HOTKEYS	- DELETE
2. pop	2	1	button	2	2		Name: I am glad to hear that	- DELETE
3. buzz	3	1	button	2	2		Name: Great	- DELETE
4. ding	4	1	button	2	2		Name: Laughing	- DELETE
5. clear	5	1	button	2	2		Name: No Problem	- DELETE
<b>8. column_b3</b>								
1. ping	1	1	space	2	2		Name: I am sorry	- DELETE
2. pop	2	1	button	2	2		Name: I understand	- DELETE
3. buzz	3	1	button	2	2		Name: Hold on Just 1 sec	- DELETE
4. ding	4	1	button	2	2		Name: No	- DELETE
<b>9. column_b4</b>								
1. ping	1	1	button	2	2		Name: FINAL	- DELETE
2. pop	2	1	button	2	2		Name: Are you 100% sure?	- DELETE
3. buzz	3	1	button	2	2		Name: Add to DNC list	- DELETE
4. ding	4	1	button	2	2		Name: Transfer to Verification	- DELETE
5. up	5	1	button	2	2		Name: (Please hold on)	- DELETE
6. up	6	1	button	2	2		Name: (EXIT CALL)	- DELETE

NEW Level: 1 Add New

Add An Audio File:

Sample Soundboard View customer\_order\_test

OPENING	ASK FOR ORDER	RESULTS	Q and A
MAAM - OPEN	YES RECORDER	RESULTS	Q and A
MAAM - REPEAT	FULL PLAN	Items Mail Only	800 number
MAAM - SHORT	BASIC PLAN	Husband - Wife Do It	Supplier needed
ONE-TIME-ONLY	SAMPLE PAK	How Does This Work	I am in Training
SIR - OPEN	FINAL ASK - TRIAL	How Much Time	QUICK LEAVE
SIR - REPEAT	INFOPEACE ASK	NAME OF GROUP	Supported Programs
SIR - SHORT	YES TO INFOPEACE	Did This Already	Order Status
WHING PERSON	CALL ME BACK	Care to Different	STATE - NATION
RESCHEDULE		Count on Your Support	Return question
WHO ARE YOU?		Using Computer	Who is this?
			Where are you located?
			Company name
			Website
			President
			How did you get my #
			Org Location

SCRIPTS USING THIS SOUNDBOARD:

CAMPAIGNS USING SCRIPTS THAT USE THIS SOUNDBOARD:  
TESTCAM: Test Campaign

INGROUPS USING SCRIPTS THAT USE THIS SOUNDBOARD:  
AGENTDIRECT\_CHAT Agent Direct Queue for Chats  
SALESLINE Sales inbound  
SALESEMAIL Sales Email basket  
SALES\_CHAT Sales Chat

DELETE SOUNDBOARD ENTRY  
[Click here to see Admin changes to this Soundboard entry](#)

Admin 3 Records Version: 2.14.15 Build: 10000-2015

Figure 175. Admin Agent Audio Soundboards Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups

MODIFY A TTS RECORD: confirm\_last\_name

TTS ID: **confirm\_last\_name**

TTS Name:

Active:

Admin User Group:

TTS Voice:

TTS Text: 

Is this the members last name? <break time='500ms' /> --A--last\_name--  
B-- <break time='1000ms' /> Press one for yes, or two for no.

[DELETE THIS TTS ENTRY](#)

[Click here to see Admin changes to this TTS entry](#)

**Figure 176. Admin Text To Speech (TTS) Modification Page**



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - IP Lists

CallCard Detail

Card ID:	<b>100-00002-10011</b>
PIN:	<b>06219284</b>
Status:	<b>ACTIVE</b>
Run:	<b>100</b>
Batch:	<b>00002</b>
Pack:	
Sequence:	<b>10011</b>
Balance Minutes:	<b>3</b>
Initial Minutes:	<b>3</b>
Initial Value:	<b>0.00</b>
Purchase Order:	
Printer:	
DID:	
In-Group:	<b>TEST_IN4</b>
Language:	<b>English</b>
Name:	
Comments:	
Create User/Date:	<b>7777 / 2010-03-12 04:13:30</b>
Activate User/Date:	<b>6666 / 2015-03-24 16:40:50</b>
Used User/Date:	<b>6666 / 2015-03-24 16:40:55</b>
Void User/Date:	<b>/</b>

[Void This Card ID](#)  
[Activate This Card ID](#)  
[Reset Minutes on This Card ID](#)

Call Log for this Card ID:

#	DATE	CallerID	DID	START MIN	TALK MIN	AGENT	AGENT DATE	AGENT DISPO
0	2010-03-12 08:55:05	7275551212	7275553331	2	1	6666	2010-03-12 08:55:27	NI
1	2010-03-12 10:02:13	7275551212	7275553332	1	1	6666	2010-03-12 10:02:33	NI
2	2010-03-12 10:03:42	7275551212	7275553332	3	1	6666	2010-03-12 10:04:21	NP
3	2010-03-12 10:41:02	7275551212	7275553332	2	1	6666	2010-03-12 10:41:39	DEC
4	2010-03-12 12:02:45	7275551212	7275553332	1	1	6666	2010-03-12 12:03:10	WN

[Admin Log for this Card ID](#)

CallCard VERSION: 2.14-12 BUILD: 170409-1539

Figure 177. Admin CallCard Detail Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
- Call Times
- Shifts
- Phones
- Templates
- Carriers
- Servers
- Conferences

MODIFY CONTACT:

First Name:	<input type="text" value="Bob"/>	?
Last Name:	<input type="text" value="Collins"/>	?
Office Number:	<input type="text" value="1234"/>	?
Cell Number:	<input type="text" value="917275551212"/>	?
Other Number 1:	<input type="text" value="918135551212"/>	?
Other Number 2:	<input type="text" value="8635551112"/>	?
BU Name:	<input type="text" value="business unit"/>	?
Department:	<input type="text" value="department"/>	?
Group:	<input type="text" value="group"/>	?
Job Title:	<input type="text" value="job title"/>	?
Location:	<input type="text" value="location"/>	?

[DELETE THIS CONTACT](#)

[Click here to see Admin changes to this contact](#)

Figure 178. Admin Contacts Modification Page

Figure 179. Admin Settings Containers Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
- Call Times
- Shifts
- Phones
- Templates
- Carriers
- Servers
- Conferences
- System Settings
- Screen Labels
- Screen Colors
- System Statuses
- Status Groups

MODIFY SETTINGS CONTAINER: TIMEZONES\_USA

Container ID:	<b>TIMEZONES_USA</b>	
Container Notes:	<input type="text" value="USA Timezone List"/>	?
Container Type:	<input type="text" value="TIMEZONE_LIST"/>	
Admin User Group:	<input right;"="" text-align:="" type="text" value="---ALL---&lt;/input&gt;&lt;/td&gt;&lt;td style="/> ?	
Container Entry:	<div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <p>USA,AST,N,Atlantic Time Zone</p> <p>USA,EST,Y,Eastern Time Zone</p> <p>USA,CST,Y,Central Time Zone</p> <p>USA,MST,Y,Mountain Time Zone</p> <p>USA,MST,N,Arizona Time Zone</p> <p>USA,PST,Y,Pacific Time Zone</p> <p>USA,AKST,Y,Alaska Time Zone</p> <p>USA,HST,N,Hawaii Time Zone</p> </div>	

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY AN AUTOMATED REPORT

Report ID: **new\_test\_auto\_report**

Last Run Time: **2019-03-16 23:59:02** (1 seconds)

Report Name:

Admin User Group:

Run Server:

Report Times:

Report Weekdays:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Report Month Days:

Report Destination:

Email From:

Email To:

Email Subject:

FTP Server:

FTP User:

FTP Pass:

FTP Directory:

Filename Override:

Active:

Run Now Trigger:

Report URL:

[DELETE THIS AUTOMATED REPORT](#)

[Click here to see Admin changes to this automated report](#)

**Figure 180. Automated Reports Modification Page**

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY IP LIST

IP List: **test\_ip\_list**

IP List Name:  ?

Active: Y ?

Admin User Group: ---ALL--- ?

IP Addresses:

(one ip address per line only) ?

```
1.1.1.1
2.2.2.2
3.3.3.3
4.4.4.4
5.5.5.5
169.140.257.340
```

USER GROUPS USING THIS IP LIST:  
[7ADMIN](#) 7 ADMIN

[DELETE THIS IP LIST](#)

[Click here to see Admin changes to this IP List](#)

Figure 181. IP List Modification Page



**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Carriers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - VM Message Groups
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists

MODIFY A VM MESSAGE GROUP RECORD: testing\_only2

VM Message Group ID: **testing\_only2**

VM Message Group Notes:  ?

Admin User Group:  ?

Active:  ?

Rank	Time Range	Display	File name	
1	0700 - 1200	Morning message	echo-test	- DELETE
2	1200 - 1800	Afternoon message	ding	- DELETE
3	1800 - 2400	Evening message	beep	- DELETE
4	0700 - 2400	Second call message	silence	- DELETE
5	0000 - 2400	Third call message	chopin-selection-35minutes	- DELETE
6	0000 - 2400	Testing DYN province	DYNvm-goodbye --A--province--B-- ding silence	- DELETE

Add An Audio File:  ?

Display Name:  Time Range:  to

**CAMPAIGNS USING THIS VM MESSAGE GROUP:**

[TESTCAMP](#) Test Campaign  
[TEST3](#) testing 3

[DELETE VM MESSAGE GROUP ENTRY](#)

[Click here to see Admin changes to this VM Message Group entry.](#)

Figure 182. VM Message Groups Modification Page

**ADMINISTRATION**

- Reports
- Users
- Campaigns
- Lists
- Quality Control
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin
  - Call Times
  - Shifts
  - Phones
  - Templates
  - Centers
  - Servers
  - Conferences
  - System Settings
  - Screen Labels
  - Screen Colors
  - System Statuses
  - Status Groups
  - CID Groups
  - Voicemail
  - Email Accounts
  - Audio Store
  - Music On Hold
  - Languages
  - Audio Soundboards
  - VM Message Groups
  - Text To Speech
  - CallCard Admin
  - Contacts
  - Settings Containers
  - Automated Reports
  - IP Lists
  - Queue Groups

MODIFY A QUEUE GROUP RECORD: Test\_QG

Queue Group ID: **Test\_QG**

Queue Group Name:

Admin User Group:

Active:

Included Campaigns

- ALTTEST - Alt dialing test
- APPTAGNT - Appointments All Agents
- APPTENG - Appointments English
- APPTSPA - Appointments Spanish
- EMAILTST - Inbound email tester
- INACTIVE - Test inactive campaign
- JDTEST - JD Test set con email
- MIKETEST - Bug verification
- SHIPAGNT - Shipping All Agents
- SHIPENG - Shipping English
- SHIPFRE - Shipping French
- SVYTEST - survey test campaign
- TEST\_CMP - Test underscore test
- TEST22 - Campaign used for shared DNC list
- TEST3 - testing 3
- TESTCAMP - Test Campaign 1
- TESTSPC - test with a space

Included Inbound Groups

- STAY - Testing options
- 123 - em|gen|j
- 25\_CL\_in - Test 2
- 255CL\_in - Test 1
- 5001 - Robert 501
- 9999999 - 9999999
- AAA\_ALL\_TEST - Alpha test
- ACROUTE\_191 - Area code routing for DID 191
- AFTER\_CALL\_SURVEY - After call survey with SC URL
- AGENTDIRECT\_63 - 63 prefix agentdirect queue
- AGENTDIRECT\_CHAT - Agent Direct Queue for Chats
- AGENTDIRECT9 - always on agentdirect
- AGENTDIRECTchat - Testing
- AGENTDIRECTemail - AGENTDIRECT email test
- ALL\_HANGUP - all hangups
- APRILTEST - April in-Group Test
- asdfasdfad - adfasdfad
- ASK\_AFTERCALL\_SURVEY - Ask then after call survey
- AUDIO\_TEST - Test audiostore playback
- CALL\_MENU - Callmenu IVR permissions only
- CHAT\_TEST\_GROUP - initial chat test group
- CL\_GALLERIA - TEST inbound galleria
- cpap - cpap
- dbNewEmail - DanEmail
- DEV\_EMAIL - Dev test email
- DID\_RECORDING - Governs call settings
- DROP\_APPT\_ENG - Appointments English Drop InGr
- DROP\_APPT\_SPA - Appointments Spanish Drop InGr
- DROP\_SHIP\_ENG - Shipping English Drop InGroup
- DROP\_SHIP\_FRE - Shipping French Drop InGroup
- EMAIL\_XFER\_TEST - Testing email transfers
- EMAILCOPY - Test ingroup for priority
- EMPLOYEE\_ENTRY - Employee Entry Closed
- export1 - export report
- INT\_TEST - 1111
- JON\_TEST\_IN\_EMAIL - Jons test email ingroup
- jonstestin - jons test ingroup
- LEADTEST - Testing lead creation
- MIKE\_EMAIL - MAIL BACKED UP
- MIKE\_EMAIL\_NEW - Mikes Email Testing
- MIKE\_IN - MIKETEST
- MIKE\_RINGALL - On hook group
- MIKEAGENTDIRECTTEST - AD Testing
- MIKECHAT - Mikes Chatroom
- NANQUE\_1 - Forced No-Agent-Np-Queue 1
- NANQUE\_2 - Forced No-Agent-Np-Queue 2
- NEW\_GROUP\_EXT - New EXT\_GROUP
- NEW\_GROUP\_EXT\_1 - New EXT\_GROUP 1
- NEWEMAIL - TEST inbound galleria
- nextavail - ingroup
- REC\_CONTAINER - Holds the call
- SALESLINE - Training Sales Line
- SUPERT - Testing
- TEST\_AFTERHOURS - testing after-hours
- TEST\_DIAL\_INGROUP012 - test dial ingroup max length
- TEST\_EMAIL\_EMPTY - test empty email in-group
- TEST\_ERROR - Testing ERROR in-group
- TEST\_IN - TEST inbound
- TEST\_IN2 - TEST inbound 2
- TEST\_IN3 - TEST inbound 3
- TEST\_IN4 - TEST inbound 4
- TEST\_IN5 - Test 5 ingroup
- TEST\_IN6 - testing copy group
- TEST\_NOANSWER - test noanswer DROP 1 sec
- TEST\_VM\_DROP - Test Voicemail Drop
- testing - testing
- testtrans - Test Transfers
- TESTTTT - ERROR
- TRAIN\_DID - Training from DID
- TRAINING\_10 - Training May 2010
- TRAINING\_INBOUND - Training September 2009 In
- TRAINING\_MAY\_2012 - Training May 2012 test setup
- video1 - this is a video
- VM\_MESSAGE\_EN - English voicemail message
- VM\_MESSAGE\_ES - Spanish voicemail message
- XML\_PULL - XMLPULL IVR permissions only

[DELETE QUEUE GROUP ENTRY](#)

[Click here to see Admin changes to this Queue Group entry](#)

Figure 183. Queue Groups Modification Page

ADMINISTRATION		AVAILABLE TIMEZONES					
Country	Zone	DST	Description	Offset	Current Time		
ABW	AST	N	Aruba - Aruba	-4	2022-04-29 11:47:12		
AFG	AFT	N	Afghanistan - Afghanistan	+4.5	2022-04-29 20:17:12		
AGO	WAT	N	Angola - Angola	+1	2022-04-29 16:47:12		
AIA	AST	N	Anguilla - Anguilla	-4	2022-04-29 11:47:12		
ALB	CET	Y	Albania - Albania	+1	2022-04-29 17:47:12		
AND	CET	Y	Andorra - Andorra	+1	2022-04-29 17:47:12		
ARE	GST	N	United Arab Emirates - United Arab Emirates	+4	2022-04-29 19:47:12		
ARG	ART	N	Argentina - Argentina	-3	2022-04-29 12:47:12		
ARM	AMT	Y	Armenia - Armenia	+4	2022-04-29 19:47:12		
ASM	SST	N	American Samoa - American Samoa	-11	2022-04-29 04:47:12		
ATA	CAST	N	Antarctica - Antarctic Aus Territory	+8	2022-04-29 22:47:12		
ATG	AST	N	Antigua and Barbuda - Antigua and Barbuda	-4	2022-04-29 11:47:12		
AUS	AEST	Y	Australia - New South Wales & Capitol	+10	2022-04-30 01:47:12		
AUS	AEST	N	Australia - Queensland	+10	2022-04-30 01:47:12		
AUS	ACST	Y	Australia - Southern Australia	+9.5	2022-04-30 01:17:12		
AUS	ACST	N	Australia - Northern Territory	+9.5	2022-04-30 01:17:12		
AUS	AWST	N	Australia - Western Australia	+8	2022-04-29 23:47:12		
AUT	CET	Y	Austria - Austria	+1	2022-04-29 17:47:12		
AZE	AZT	Y	Azerbaijan - Azerbaijan	+1	2022-04-29 19:47:12		
BDI	CAT	N	Burundi - Burundi	+2	2022-04-29 17:47:12		

ADMINISTRATION		PHONE CODES							
Code	Country	AreaCode	State	DST	Description	Offset	TZ Code	Current Time	
1	USA - United States of America	201	NJ	Y	New Jersey - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	202	DC	Y	District of Columbia - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	203	CT	Y	Connecticut - United States of America	-5	EST	2022-04-30 08:53:15	
1	CAN - Canada	204	MB	Y	Manitoba - Canada	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	205	AL	Y	Alabama - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	206	WA	Y	Washington - United States of America	-8	PST	2022-04-30 06:53:15	
1	USA - United States of America	207	ME	Y	Maine - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	208	ID	Y	Idaho - United States of America	-7	MST	2022-04-30 08:53:15	
1	USA - United States of America	209	CA	Y	California - United States of America	-8	PST	2022-04-30 06:53:15	
1	USA - United States of America	210	TX	Y	Texas - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	212	NY	Y	New York - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	213	CA	Y	California - United States of America	-8	PST	2022-04-30 06:53:15	
1	USA - United States of America	214	TX	Y	Texas - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	215	PA	Y	Pennsylvania - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	216	OH	Y	Ohio - United States of America	-5	EST	2022-04-30 08:53:15	
1	USA - United States of America	217	IL	Y	Illinois - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	218	MN	Y	Minnesota - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	219	IN	Y	Indiana - United States of America	-6	CST	2022-04-30 07:53:15	
1	USA - United States of America	220	OH	Y	Ohio - United States of America	-5	EST	2022-04-30 08:53:15	

Figure 184. Phone Codes, Postal Codes, Timezones display Pages

ADMINISTRATION		POSTAL CODES					
Country	Postal Code	State	DST	Offset	Current Time		
USA - United States of America	00501	NY	Y	-5.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00544	NY	Y	-5.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00801	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00902	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00803	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00804	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00805	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00806	PR	N	-4.0	Sat 30 Apr 2022 08:54		
USA - United States of America	00810	PR	N	-4.0	Sat 30 Apr 2022 08:54		

Listloader Custom Template Maker ?

**Create a new template**

Sample file fitting template:  
(needed for field assignment) ?

No file chosen

[BACK TO ADMIN](#)   [Go to Lead Loader](#)

**Edit / delete an existing template**

Select template to edit/delete: ?

1234 - 1234 v

---

Edit template form ?

**Standard Field**

Template ID: 1234

Template Name:  ?

Template Description:  ?

**Custom Field**

**CURRENT FILE LAYOUT:** "

(unused)", "security\_phrase|first\_name", "last\_name", "address1", "city", "state", "postal\_code", "phone\_number", "date\_of\_birth", "minitial"  
?

LIST ID: 11113

VENDOR LEAD CODE:	<input type="text"/>
SOURCE ID:	<input type="text"/>
PHONE CODE:	<input type="text"/>
PHONE NUMBER:	<input type="text" value="7"/>
TITLE:	<input type="text"/>
FIRST NAME:	<input type="text" value="1"/>
MIDDLE INITIAL:	<input type="text"/>
LAST NAME:	<input type="text" value="2"/>
ADDRESS1:	<input type="text" value="3"/>
ADDRESS2:	<input type="text"/>
ADDRESS3:	<input type="text"/>
CITY:	<input type="text" value="4"/>
STATE:	<input type="text" value="5"/>
PROVINCE:	<input type="text"/>
POSTAL CODE:	<input type="text" value="6"/>
COUNTRY CODE:	<input type="text"/>
GENDER:	<input type="text"/>
DATE OF BIRTH:	<input type="text" value="8"/>
ALT PHONE:	<input type="text"/>
EMAIL:	<input type="text"/>
SECURITY PHRASE:	<input type="text" value="1"/>
COMMENTS:	<input type="text"/>
RANK:	<input type="text"/>
OWNER:	<input type="text"/>
REQUIRED TEST:	<input type="text"/>
MINITAL:	<input type="text" value="9"/>

**Figure 185. Lead Loader Template Editor Page**

**ADMINISTRATION**  
Reports

## Two-Factor-Authentication

Your account has Two-Factor-Authzication enabled on it. In order to log in, you will need to verify your identity by submitting a temporary authorization code. Click on the icon below for the delivery method you would like to use to receive your authorization code:

	<b>Email you an auth code</b> Send an email to: vi.....@gmail.com
	<b>Call you and play an auth code</b> Place a phone call to: 999xxxxx12
	<b>Text-Message you an auth code</b> Send a message to: 999xxxxx12

Figure 186. Two-Factor Authentication(2FA) Login process

**ADMINISTRATION**  
Reports

## Two-Factor-Authentication

Your authorization code has been sent by EMAIL to: vi.....@gmail.com

Please enter the Auth Code that you have received by EMAIL into the field below, and click the SUBMIT button. [To resend your auth code, click here to go back.](#)

Authorization Code:

**ADMINISTRATION**  
Reports

## Two-Factor-Authentication

Authorization code accepted, your login is complete, you may now continue

Lead information: Test Lead 583 - 999900583  
 Lead ID: 795780 List ID: 107 Timezone: -4:00 Reset Code: Y1  
 User: VQAD Called Count: 5 (today: 0) Last Call: 2022-04-21 13:24:04  
[Turn on archived logs display](#)

Title MR First Test  
 MI E Last Lead 583  
 Address1 123 Main St  
 Address2  
 Address3 9999001583  
 City New York  
 State NY Postal Code 10110  
 Province  
 Country Date of Birth 1970-01-01  
 Phone 9999000583  
 DialCode 1  
 ---READONLY---Alt Phone  
 Email test@test.com  
 Show none  
 Vendor ID 1000583  
 Source ID A  
 Rank 0  
 Owner  
 Comments comments

Disposition: PDROP (with TESTCAMP statuses)

Modify vicidial log   
 Modify agent log   
 Modify closer log   
 Add closer log record

**Callback Details:**  
 If you want to change this lead to a scheduled callback, first change the Disposition to CBHOLD, then submit and you will be able to set the callback date and time

**CUSTOM FIELDS FOR THIS LEAD:**

Switch Form: Main Form | Alternate Form | 2nd Alt Form

test select list: asdfg | help:

test date select: 2020-01-23 | help: test time: 22 | 49 | help: End Time: 20 | 49 | help:  
 Followup Time: 20 | 49 | help: Followup TimeX: 20 | 49 | help:

multi test:  
 multi select name 1  
 multi select name 2  
 multi select name 3  
 multi select name 4

radio test help:  
 multi select name 1  
 multi select name 2  
 multi select name 3

**CALLS TO THIS LEAD:**

* DATE/TIME	LENGTH	STATUS	TSR	CAMPAIGN	LIST	RECORD	HANGUP REASON	PHONE	CALLER ID	UNIQUEID	SERVER IP
2022-04-21 13:24:04	0	PDROP	VQAD	TESTCAMP	107	795780	NONE	9999000583 MAIN	<7735558861> V421132940000795780	1650561844.5261	192.168.198.5
2022-03-12 10:30:43	15	B	6666	TESTCAMP	107	795780	AGENT	9999001583 ACDRES	<8887776666> M312130303000795780	1647099043.4636	192.168.198.5
2022-03-12 10:30:35	6	ALTNUM	6666	TESTCAMP	107	795780	AGENT	9999000583 MAIN	<8887776666> M312130303000795780	1647099035.4632	192.168.198.5
2020-01-22 20:49:23	2	TD	6666	TESTCAMP	107	795780	AGENT	9999000583 MAIN	<9993334442> M122204522000795780	1579744162.741	192.168.198.5

**CLOSER RECORDS FOR THIS LEAD:**

* DATE/TIME	LENGTH	STATUS	TSR	CAMPAIGN	LIST	RECORD	WAIT	HANGUP REASON	CALL ID	DID	UNIQUEID	SERVER IP

**AGENT LOG RECORDS FOR THIS LEAD:**

* DATE/TIME	CAMPAIGN	TSR	PAUSE	WAIT	TALK	DISPO	STATUS	GROUP	SUB
2022-03-12 10:30:43	TESTCAMP	6666	0	11	4	6B	ADMIN	ADMIN	ANDIAL
2022-03-12 10:30:02	TESTCAMP	6666	32	1	8	0	ALTNUM	ADMIN	NXDIAL
2022-03-12 10:29:57	TESTCAMP	6666	0	5	0	0	ADMIN	ADMIN	NXDIAL
2020-01-22 20:49:22	TESTCAMP	6666	0	0	3	2	TD	ADMIN	NXDIAL

**PARK LOGS FOR THIS LEAD:**

* PARK TIME	CHANNEL GROUP	TSR	STATUS	GRAB TIME	HANGUP TIME	PARK SEC	TALK SEC	EXTENSION

**IVR LOGS FOR THIS LEAD:**

* CAMPAIGN	DATE/TIME	CALL MENU	ACTION

**VOICEMAIL MESSAGE DAILY COUNT LOGS FOR THIS LEAD:**

* DATE	MESSAGE STARTED COUNT	MESSAGE COMPLETED COUNT

**OUTBOUND EMAILS FOR THIS LEAD:**

* DATE/TIME	USER	CAMPAIGN EMAIL TO	MESSAGE	ATTACHMENTS

**RECORDINGS FOR THIS LEAD:**

* RECORD	DATE/TIME	SECONDS	RECID	FILENAME	LOCATION	TSR	MUTE
1	795780 2022-03-12 10:30:43	15	305622	20220312-103043_9999001583	http://	RL	6666
2	795780 2022-03-12 10:30:34	7	305621	20220312-103034_9999001583	http://	RL	6666
3	795780 2020-01-22 20:49:22	3	273348	20200122-204922_9999000583	http://	RL	6666

**RECORDING ACCESS LOG FOR THIS LEAD:**

* RECORD	DATE/TIME	RECORDING ID	USER	RESULT	IP

[Click here to see Lead Modify changes to this lead](#)  
[Click here to QC Modify this lead](#)

**GDPR compliance:**  
[Click here to download GDPR formatted data for this lead](#)  
[Click here to review and purge customer data on lead](#)

4095duration: 0 seconds

Figure 187. Admin Modify Lead Page

CALLMENUS 1:    
 CALLMENUS 2:

menu_id='after_call_survey_01'	menu_id='after_call_survey_02'
menu_name='after_call_survey_01'	menu_name='after_call_survey_02'
menu_prompts='sip-silence SPP_276_01_intro_penny'	menu_prompts='NOINTsilence SPP_276_02_cd13'
menu_timeout='10'	menu_timeout='10'
menu_timeout_prompts='NONE'	menu_timeout_prompts='NONE'
menu_invalid_prompts='NONE'	menu_invalid_prompts='NONE'
menu_repeats='0'	menu_repeats='0'
menu_time_checks='0'	menu_time_checks='0'
call_time_id='24hours'	call_time_id='24hours'
track_in_vdacs='1'	track_in_vdacs='1'
custom_dialplan_entry=''	custom_dialplan_entry=''
tracking_group='CALLMENU'	tracking_group='CALLMENU'
dtmf_log='1'	dtmf_log='1'
dtmf_fields='province'	dtmf_fields='security_phrase'
user_group='---ALL---	user_group='---ALL---
qualify_sql=''	qualify_sql=''
alt_dtmf_log='0'	alt_dtmf_log='0'
questions='0'	questions='0'
answer_signal='Y'	answer_signal='Y'
options section start	options section start
options='4'	options='3'
menu_id='after_call_survey_01'	menu_id='after_call_survey_02'
option_value='1'	option_value='1'
option_descriptions=''	option_descriptions=''
option_route='CALLMENU'	option_route='CALLMENU'
option_route_value='after_call_survey_02'	option_route_value='after_call_survey_03_end'
option_route_value_contexts=''	option_route_value_contexts=''
menu_id='after_call_survey_01'	menu_id='after_call_survey_02'
option_value='2'	option_value='2'
option_descriptions='123'	option_descriptions=''
option_route='CALLMENU'	option_route='CALLMENU'
option_route_value='after_call_survey_02'	option_route_value='after_call_survey_03_end'
option_route_value_contexts=''	option_route_value_contexts=''
menu_id='after_call_survey_01'	menu_id='after_call_survey_02'
option_value='3'	option_value='3'
option_descriptions='123'	option_descriptions=''
option_route='CALLMENU'	option_route='CALLMENU'
option_route_value='after_call_survey_02'	option_route_value='after_call_survey_03_end'
option_route_value_contexts=''	option_route_value_contexts=''
menu_id='after_call_survey_01'	menu_id='after_call_survey_02'
option_value='4'	option_value='4'
option_descriptions='123'	option_descriptions='123'
option_route='INGROUP'	option_route='INGROUP'
option_route_value='TEST_IN3'	option_route_value='TEST_IN3'
option_route_value_contexts='CIDLOOKUPALT,LS,9988,ALTTEST,44,vid_enter,vid_num,vid_conf,8'	option_route_value_contexts='CIDLOOKUPALT,LS,9988,ALTTEST,44,vid_enter,vid_num,vid_conf,8'

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