ICTDialer Software User Guide

Contents

1. Introduction:

ICTDialer is a unified communications dialing software which features automatic dialing, mass communication, CRM integration and computer telephony integration developed over Free-switch, ICTCore communications framework and angular framework and supports a variety of business scenarios based on Voice, SMS and Fax communications technologies. It empowers you to market your products and services and interact with your customers with ease and efficiency.

Following are ICTDialer features:

- Support SMS Marketing Campaign
- Support Fax Marketing Campaign
- Support Email Marketing Campaign
- Support Voice Message campaign

2. System Requirements:

To install ICTDialer you need following system requirements:

2.1. Server Pecs:

- Quad Core 3.0 GHZ
- RAM 4GB
- Hard Disk 500GB

2.2. Operating System:

- Centos 7.X

3. Installation Guide:

Complete installation guide page is here:

4. Signing In:

To start the application visit the link, a window will appear and it will ask for the user name and password. Full the required fields to **sign in**.

4.1. Login:

- Visit the project **url**:
- Enter login and password
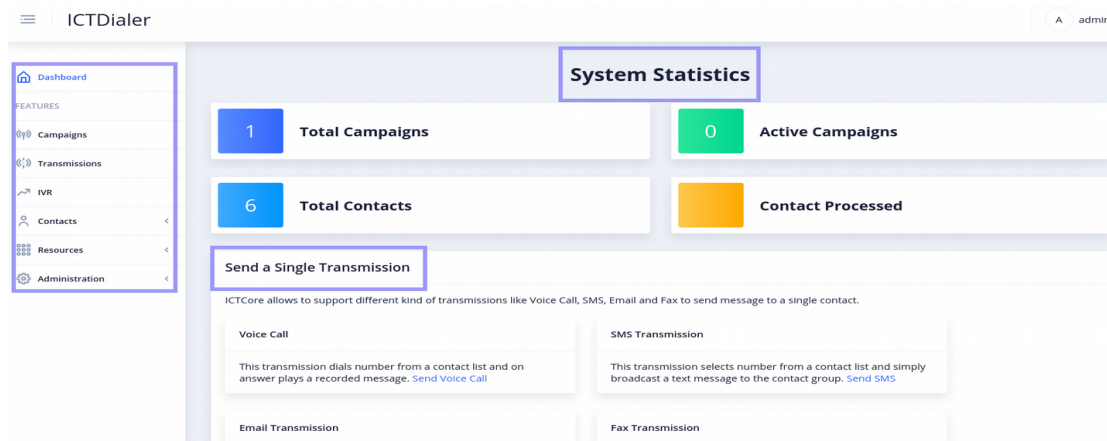- Click on "**Login**" button

Sign In

Email address:

admin@ictcore.org

Password:

••••••••••

Remember me   Forgot Password?

SIGN IN

5. Dashboard:

Once you have logged in successfully it will redirect you to dashboard/home page.
Manage all contacts, texts, voice recording, send fax, send call and much more features.

6. Setup/Configuration:

6.1. Add Contacts:

ICTDialer provide two modes to add contacts in system:
- Independent Mode (To use ICTDialer contacts)
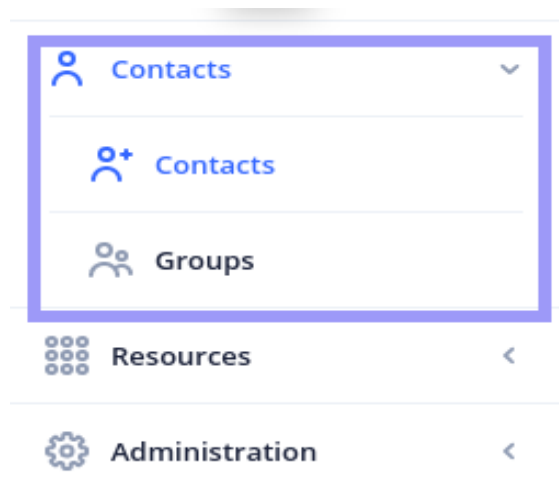- CRM Integration (To fetch contacts from CRM)

To select mode contacts CRM integration, click on **administration**, it will a open CRM settings window, select required option and click on "submit" button.
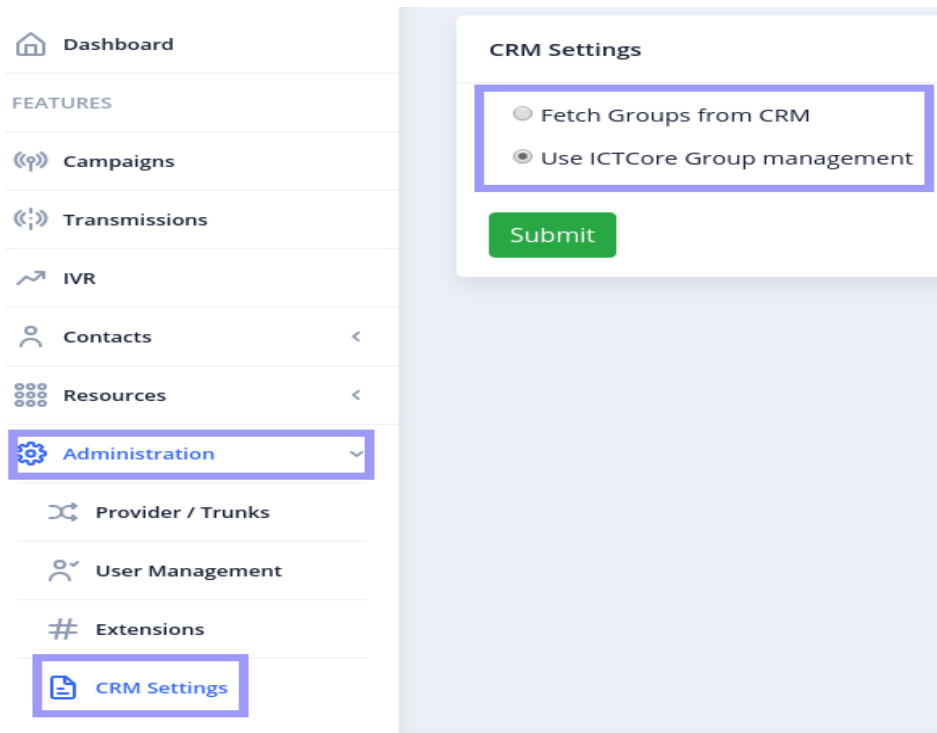
Click on **contacts** menu to manage your contacts.
There will be options:
1. Contacts
2. Groups

6.2. Contacts:

Click on **"Contacts"** sub-menu, a list of contacts will appear. Here you can manage all of your contacts.
Click on **"pencil"** icon against the contact name in the list, you can "update" contact information.
To remove contact name from list, click on **"delete"** icon.

6.2.1 Add New Contact:

Click on "**Add Contact**" button on the contact list page, it will lead you to the window form.
1. Fill the required fields by entering:
2. Personal information: Type first name and last name
3. Contacts: Enter phone number and email address.
4. Enter custom data in field boxes.

Click on "submit" button. A new contact will be created.

6.3. Contact Groups:

6.3.1 Groups:

ICTDialer provides a contact group feature. You can use group service if you want to send SMS, email, fax and voice message to a group of people.
Click on **"Groups"** sub-menu, a list of contact groups will appear on web-page. Here you can manage all of your contacts.
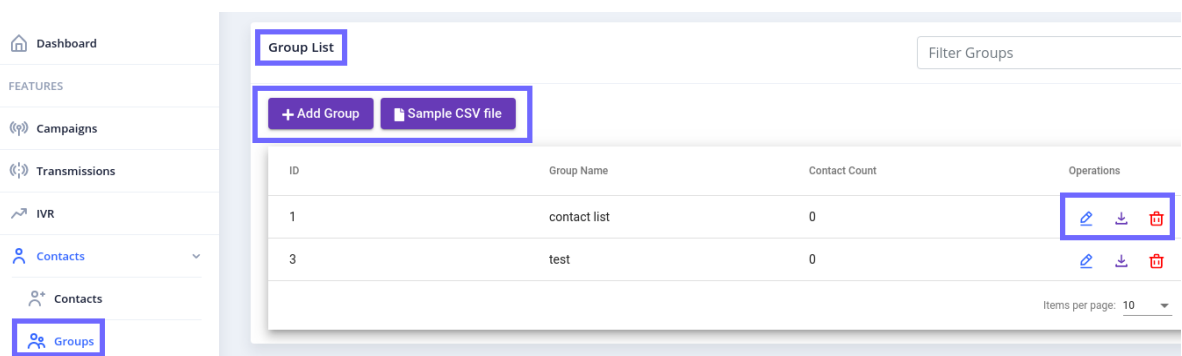
1. To download sample CSV file, click on "sample CSV file" button to save the file.
2. Click on "pencil" icon to update groups information.
3. Click on "down arrow" button to download contact group.
4. To remove contact group from list, click on "delete" icon.

6.3.2. Add New Contact Groups:

Click on "**Add Group**" button on the contact list page, it will lead you to the window form.
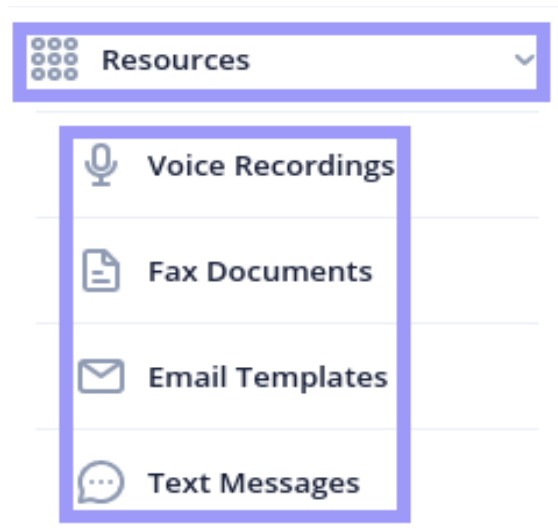Fill the required fields by entering:

1. Group Name: Type group name in text-box
2. To upload CSV file: Click on "choose file" select file from device.
3. Description: Type additional remarks/description in text-box

Click on "submit" button, a new contact group will be created.

6.4. ADD Resources:

Click on 'Resources' from the main menu, and the following resource-related sub-menus are listed. When users need to build a campaign, these resources will be used. Following resources are:

6.4.1. Voice Recordings:

Click on "Voice Recordings" sub-menu, a list of voice recording and details will appear on web-page.
Click on "pencil" icon to update information.
Click on "down arrow" button to download recording.
Click on "delete" icon to remove recordings from list.
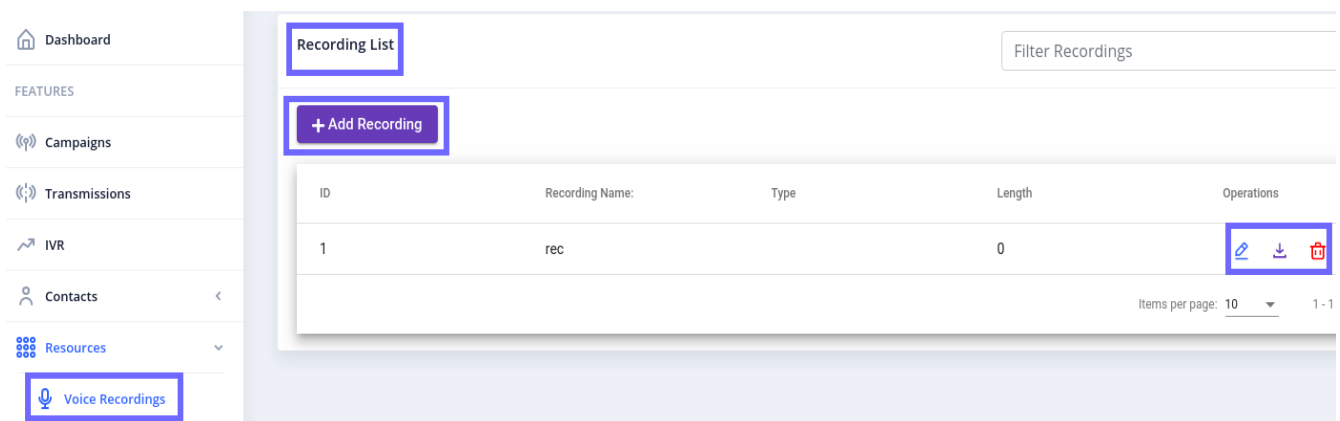
6.4.2. To Add New Recording:

Click on "**Add Recording**" button on the recording list page, it will lead you to the window form.
Fill the required fields by entering:

1. Recording information: Type recording name in text-box
2. To upload recording file: Click on "choose file" select file from device.
3. Description: Type additional remarks/description in text-box

Click on "submit" button, a new recording file will be added in list.

6.4.3. Fax Document:

Click on "fax document" sub-menu, a list of documents and details will appear on web-page.
Click on "pencil" icon to update information in document.
Click on "down arrow" button to download PDF file/document.
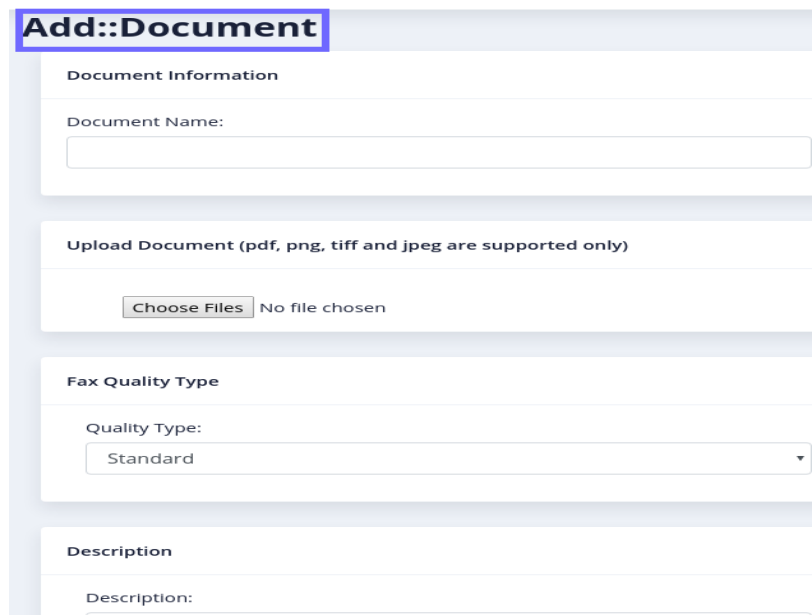Click on "delete" icon to remove the specified document from list.

6.4.4. To Add New Fax Document:

Click on "**Add Document**" button on the document list page, it will lead you to the window form.
Fill the required fields by entering:

1. Document information: Type document name in text-box
2. To upload PDF file: Click on "choose file" select file from device.
3. Select fax quality from drop-down list.
4. Description: Type additional remarks/description in text-box

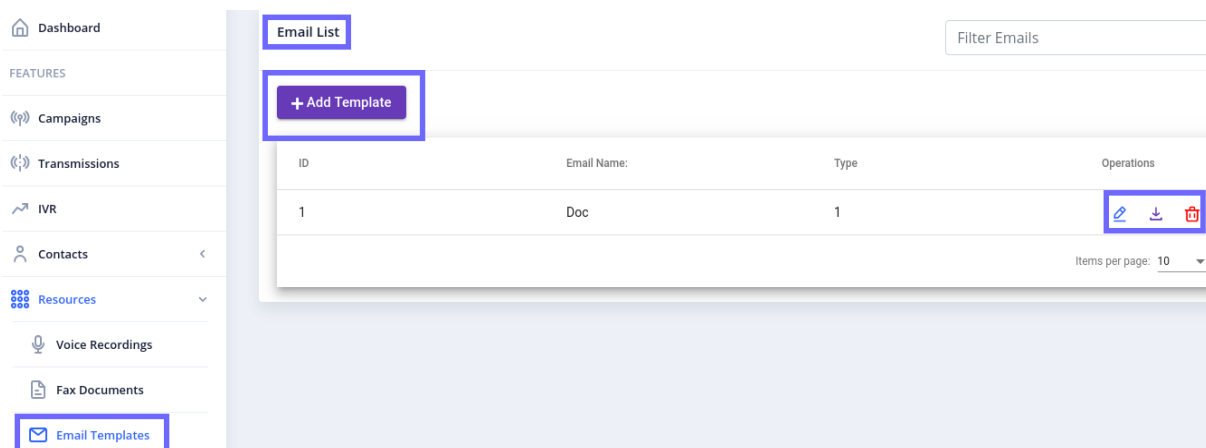Click on "submit" button, a new fax document will be added in list.

6.4.5. Email Template:

Click on "Email Template" sub-menu, a list of email templates and details will appear on web-page.
Click on "pencil" icon to update information in email templates.
Click on "down arrow" button to download email template.
Click on "delete" icon to remove the specified template from list.

6.4.6. To Add New Email Template:

Click on "**Add Template**" button on the email list page, it will lead you to the window form.
Fill the required fields by entering:
1. Email information: Type document name in text-box.
2. Type email subject and message in text-box.
3. Type plain message: Alternate text message in text-box.
4. To upload template attachment: Click on "choose file" select file from device.
5. Description: Type additional remarks/description in text-box

Click on "submit" button, a new template will be added in list.

6.4.7. Text Message:

Click on "Text Message" sub-menu, a list of message and details will appear on web-page.
Click on "pencil" icon to update information in messages.
Click on "delete" icon to remove the specified messages from list.

6.4.8. To Create New Text Message:

Click on "**Add Text**" button on the text list page, it will lead you to the window form.
Fill the required fields by entering:

1. Text information: Type text name in text-box.
2. Type actual message in text-box.
3. Description: Type additional remarks/description in text-box

Click on "submit" button, a new fax document will be added in list.

6.4.9. IVR (Interactive Voice Response):

Click "IVR" option from side-menu, it will show you the list of IVR's.
Click on "pencil" icon to update information in IVR.
Click on "delete" icon to remove the specified IVR from list.

6.4.10. To Design New IVR:

Click on "**New IVR**" button on the text list page, it will lead you to the window form.
Fill the required fields by entering:
1. IVR information: Type IVR name in text-box.
2. Use following icons to design IVR.
3. Description: Type additional remarks/description in text-box

Click on "submit" button, a new IVR will be added in list.

6.5. Add Provider/Trunks:

To configure provider click on "administration" menu
Click on "Provider/Trunk" sub-menu, a window will open showing provider list and detail.
Click on "pencil" icon to update provider information.
Click on "delete" icon to remove the specified provider/truck from list.

6.5.1. To Add New Provider:

Click on "**Add Provider**" button on the provider list page, it will lead you to the window form.
Fill the required fields by entering:

1. Select gateway type from drop list.
2. Enter user name and password.
3. Enter host and port in field box.
4. Enter prefix and select weight from drop list.
5. Type additional information in comments box.
6. Click on yes button if provider is registered otherwise click on no.

Click on "Submit" button, a new provider will be added in provider list.

7. Launch New Campaign :

7.1. Campaigns:

ICTDialer supports complete campaign management, a user can manage, monitor and run multiple campaigns separately and independently to send messages to contact group.
Click on "Campaigns" menu, a list of campaigns will appear on web-page.
Following campaigns are:

- SMS Campaign
- Email Campaign
- Fax Campaign
- Voice Campaign
- IVR Campaign

Click on the start button to run a campaign
Click on the stop button to stop a campaigns
Click on "pencil" icon to update campaign information.
Click on "delete" icon to remove the specified campaign from the list.
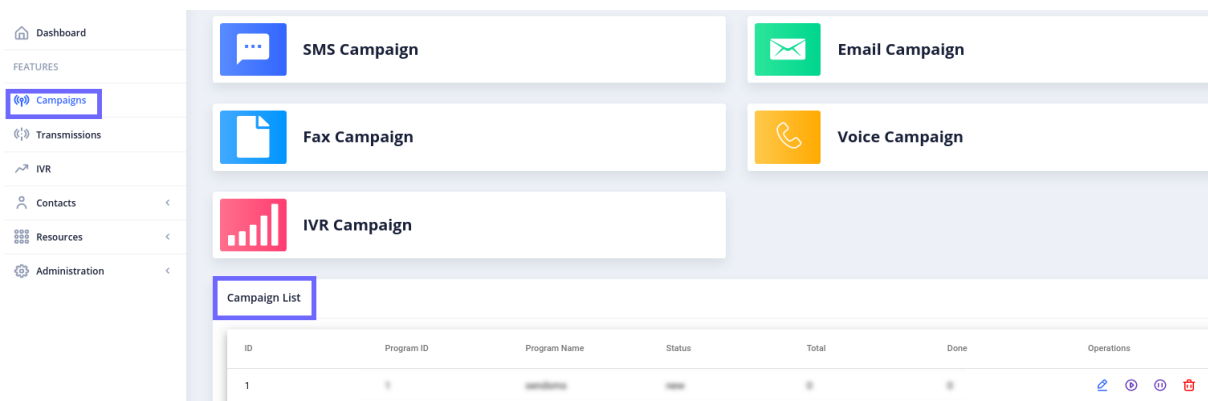
7.1.1. Create SMS Campaign:

Click on "**SMS Campaign**" button on the campaign list page, it will lead you to the window form.
Fill the required fields by entering:

1. Choose your SMS from drop-down list
2. Select contact group from drop list
3. Enter number of retires
4. Type delay time in text-box

Click on "Submit" button, a new sms campaign will be created.

7.1.2. Create Email Campaign:

Click on "**Email Campaign**" button on the campaign list page, it will lead you to the window form.
Fill the required fields by entering:

1. Choose the email template from drop-down list.
2. Select contact group from drop list
3. Enter number of retires
4. Type delay time in text-box

Click on "Submit" button, a new email campaign will be created.

7.1.3. Create Fax Campaign:

Click on "**Fax Campaign**" button on the campaign list page, it will lead you to the window form.
Fill the required fields by entering:

1. Choose your fax document from drop-down list
2. Select contact group from drop list
3. Enter number of retires
4. Type delay time in text-box

Click on "Submit" button, a new fax campaign will be created.

Create Document Campaign

Choose Document

Document:

Choose Group

Groups:

Retry

Retry:

Delay b/w Fax in minutes

Delay b/w calls

Source

◉ Remote

Submit

7.1.4. Create Voice Campaign:

Click on "**Voice Campaign**" button on the campaign list page, it will lead you to the window form.
Fill the required fields by entering:

1. Choose your SMS from drop-down list
2. Select contact group from drop list
3. Enter number of retires
4. Type delay time in text-box

Click on "Submit" button, a new campaign will be created.

Create Voice Campaign

Choose Voice Recording

Voice Message

Choose Group

Groups:

Retry

Retry:

Delay b/w Calls in minutes

Delay b/w calls

Source

◉ Remote

Submit

7.1.5. Create IVR Campaign:

Click on "**IVR Campaign**" button on the campaign list page, it will lead you to the window form.
Fill the required fields by entering:

1. Choose IVR from drop-down list
2. Select contact group from drop list
3. Enter number of retires
4. Type delay time in text-box

Click on "Submit" button, a new campaign will be created.

8. Launch Single Transmissions:

8.1. Transmissions:

ICTDialer support different type of transmissions, like voice call, SMS, Email, Fax to send
message to single contact.
Click on **"Transmissions"** from side-menu it will show you the list of transmissions on web-
page.
Following transmissions are:

- Send Single SMS transmission
- Send Single Email transmission
- Send Single Fax transmission
- Send Single Voice Call transmission
- Send Single IVR transmission
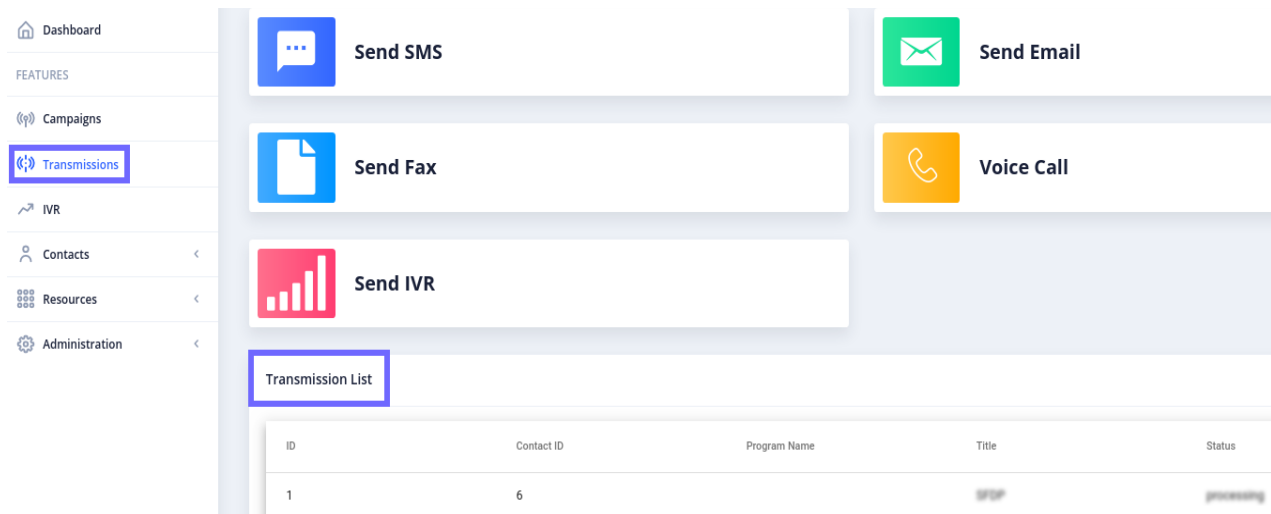
8.1.1. To Send Single SMS:

Click the "**Send SMS**" button on transmission list page. A send sms window form will open.
Fill the required fields by entering:

1. Type sms title in text-box
2. Choose the text document from the drop-down list to be sent
3. Select destination contact to be sent
4. Select retries from drop down list

Click the submit button, a sms transmission will be created.
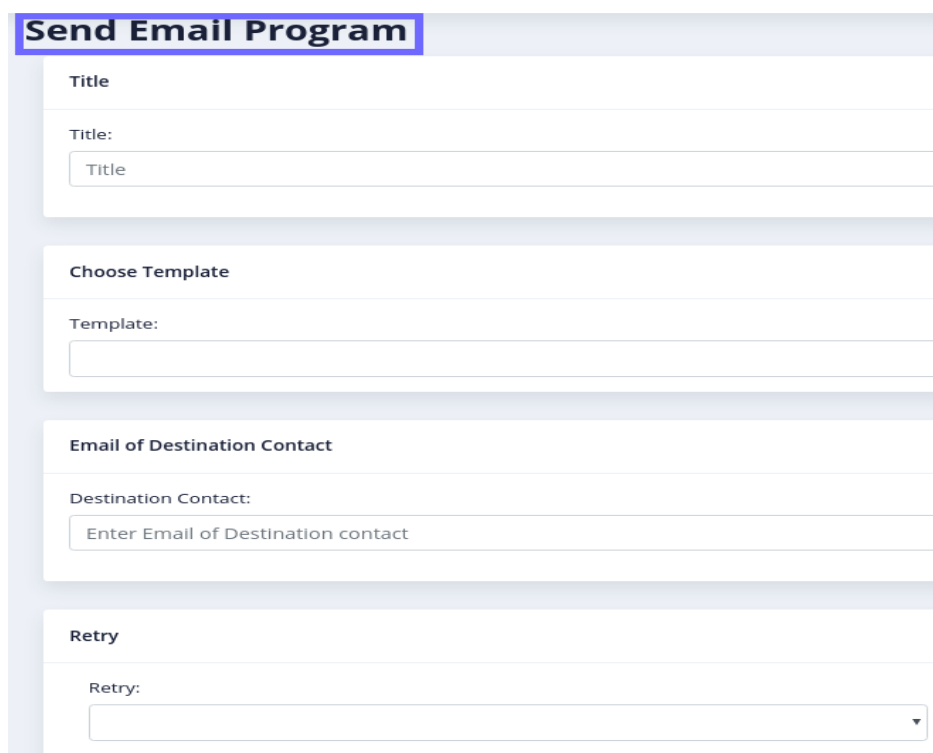
8.1.2. To Send Single Email:

Click the "**Send Email**" button on transmission list page. A send email window form will open.
Fill the required fields by entering:

1. Type email title in text-box
2. Choose email template from the drop-down list to be sent
3. Select destination contact to be sent
4. Select retries from drop down list

Click the submit button, a email transmission will be created.

Send Email Program

Title

Title:

> Title

Choose Template

Template:

Email of Destination Contact

Destination Contact:

> Enter Email of Destination contact

Retry

Retry:

8.1.3. To Send Single Fax:

Click the "**Send Fax**" button on transmission list page. A send fax window form will open.
Fill the required fields by entering:

1. Type fax title in text-box
2. Choose the fax document from the drop-down list to be sent
3. Select destination contact to be sent
4. Select retries from drop down list

Click the submit button, a fax transmission will be created.

Send Fax Document Program

Title

Title:

Title

Choose Document

Document:

Phone number of Destination Contact

Destination Contact:

Enter Phone number of Destination contact

Retry

Retry:

8.1.4. To Send Single Voice Message:

Click the "**Voice Call**" button on transmission list page. A send sms window form will open.
Fill the required fields by entering:

1. Type title in text-box
2. Choose the voice recording from the drop-down list to be sent
3. Select destination contact to be sent
4. Select retries from drop down list

Click the submit button, a voice transmission will be created.

Send Voice Message

Title

Title:

Title

Choose Voice Recording

Voice Message

Phone number of Destination Contact

Destination Contact:

Enter Phone number of Destination contact

Retry

Retry:

8.1.5. To Send Single IVR:

Click the "**Send IVR**" button on transmission list page. A send sms window form will open.
Fill the required fields by entering:

1. Type IVR title in text-box
2. Choose IVR from the drop-down list to be sent
3. Select destination contact to be sent
4. Select retries from drop down list

Click the submit button, a IVR transmission will be created.