VICIdial®

MANAGER MANUAL

for ViciDial release 2.2.1

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Table of Contents

INTRODUCTION

This manual is meant as a resource for Call Center Managers and System Administrators to better understand how ViciDial works and to learn how to use all of it's features correctly as well as answer questions as to why things work the way they do within ViciDial and it's management interfaces. It is expected that you have thoroughly read through the ViciDial Agent manual before reading this manual. This manual is current as of the 2.2.1 release of ViciDial/astGUIclient.

What is ViciDial?

ViciDial is a Call 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. The agent logs into one campaign and can also take calls from one or more in-groups(or inbound queues) at the same time they are placing/taking outbound calls. ViciDial can function as an ACD, Predictive Dialer and can do many of the functions of a standard PBX as well. There are hundreds of features and options available within ViciDial, and they are covered here in this manual.

What is a ViciDial manager?

A ViciDial 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 ViciDial system. They also control the call pacing and other campaign settings while a campaign is running in the call 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 call center effectively.

How do the manager administration screens work?

The ViciDial manager administration page(/vicidial/admin.php) gives links to modify many aspects of how the ViciDial 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 2.2.1), the ViciDial 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 ViciDial Call 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 ViciDial management interface.

What is new in version 2.2.1?

In this latest version of ViciDial here is a list of just a few of the new features we have added since the last release(2.0.5):

- Added new method for monitoring from the Real-time screen using a phone entry
- Outbound Surveys and Answering Machine messages using Cepstral Text-to-speech
- Added rank and owner to the vicidial_list table
- Added RANDOM, LAST CALL TIME, OWNER, RANK and TIMEZONE lead order options
- Changed List Mix to be active by default and added more List Mix options
- Added Call Menus (aka IVR) allowing for treed DTMF options using the Admin web interface
- Added the central Audio Store, allows audio prompts upload ability from web interface
- Added central Voicemail Server and auto dial limit setting to System Settings
- Added option to login as an agent with no phone
- Added live monitoring of calls and retrieval of recorded calls through QueueMetrics
- Added queue_log DID and IVR logging entries for QueueMetrics
- Added ability to force auto-incremented ID values for Users, Campaigns, Lists, etc...
- Added Agent Time Detail report showing the timeclock, agent activity and pause time
- Added DID traffic stats report
- Added User Time-Clock Detail report
- Added new Inbound Summary Hourly Report
- Added Outbound Summary Interval Report
- Added DAHDI channel compatibility and carrier logging for outbound list calls
- Added option to lock out DROP calls from being called again for a period of time(UK regs)
- Changed In-Group and Call Menu prompts to allow for multiple audio files per prompt
- Added a conf_secret field to phones and servers for greater security
- Added no-agent-no-queueing to In-Groups
- Changed the agent alert extension to a filename in in-groups
- Added process and report for updating statuses on leads through a batch process
- Added the option for a Quick Transfer from the agent screen
- Added Multiple Campaign Drop Rate Groups to allow campaigns to share a drop percentage
- Added pre-Answer statuses and processing for the Sangoma CPD(Call Progress Detection)
- Added Agents Status View sidebar to agent interface, and available transfer agent frame
- Added Calls in Queue display to Agent screen, along with click to grab a call option
- Added a Re-Queue Call button to send the current call back as AGENTDIRECT call
- Added automatic list reset option to List Modification screen
- Added no-hopper dialing option for MANUAL and INBOUND_MAN campaigns
- Added lead owner option to restrict dialing within a list to territory/group/user
- Agent screen Alert option is now disabled by default.
- Added --GSW option for audio processing scripts for .wav GSM codec with a RIFF header
- Added agent screen display dialable leads option for campaigns
- Added ViciDial Balance Rank for servers to allow prioritizing the servers
- Added option to the Outbound(VDAD) report to include the overflow drop in-group
- Added longest_wait_time option for Next Agent Call in Campaigns and In-Groups
- Changed Real-time Report screen agent time display to be based upon a change in "state"
- Changed the ViciDial agent screen to not delete session reservations at agent logout
- Changed voicemail config to use phone password as voicemail password
- Rewrote how scripts are displayed in the ViciDial agent interface
- Added List script/CID/AM message/Drop group override settings
- Added web-configurable Music-On-Hold and conferences to the admin interface

- Changed the reloading of Asterisk modules to only reload changed settings
- Added "Active Agent Server" option to servers to allow disabling of agent phone logins
- Added DEAD call time logging and agent notification of call hangup
- Added second web form button with different URLs possible per campaign and in-group
- Changed Answering Machine Message campaign option to an audio select
- Added additional Voicemail configuration through admin.php
- Added Agent-selectable territories list upon login
- Added ability to use Remote Agents with all inbound next-agent-call settings
- Added ability to use DNCC and DNCL as Auto-Alt-Dial statuses
- Added ability to DNC filter by North American AREACODE using 201XXXXXXX as a DNC entry
- Added agi-NVA_recording.agi script to allow for recording and logging of non-agent calls
- Added secondary FTP audio recording transfer script to send recordings to second server
- Added option for adding custom links to the reports page
- Added an API function(change_ingroups) which allows changing of agent-selected in-groups
- Added Recording Filename and Recording ID as Script variables
- Redesigned the Transfer-Conf frame in the agent interface, added CONSULTATIVE checkbox
- Added "Delete Voicemail After Email" options to delete messages after they are emailed
- Added CRM Login Popup to campaign settings to allow for custom window on login
- Added 5 custom fields to the user settings
- Added Initial Queue Position logging on inbound calls and summary in the Inbound report
- Added six duplication check methods to the non-agent API add_lead function
- Added VIDPROMPT options for in-group call handling to prompt caller for an ID number
- Added agent API function to update vicidial_list fields and the fields on agent screen
- Added timer action options to campaigns and in-groups
- Added three more transfer-conference number-to-dial presets, and ListID override options
- Added Dispo Call URL, allows back-end call to a web page or URL when agent dispos a call
- Added log rolling archive script to automatically move logs into archive tables monthly
- Added popup calendars to many of the reports for easier date selection
- Changed AGENTDIRECT selection to be triggered by clicking on AGENTS link
- Reformatted lead search page and added first and last name search options
- Added 3-WAY status to the Real-time report to show when agents are in consultative xfer sessions
- Added carrier log display option to Real-time report to show the hangup causes for recent calls
- Added ability to search logs in the Lead Search page
- Added headers to the call export and list export

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/vicidial/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, on to the tutorials!

A. 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 ViciDial 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. As for hard-phones: Polycom and Snom are recommended, but Linksys/Cisco and Grandstream should also work.

1. Go to the ViciDial 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)
    login: 201
    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)
    Template ID: SIP_generic

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 "Conf File Secret" 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 "Conf File Secret" 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 vicidial.php script with the phone login(Login) of "201" and phone

password(Password) of "test".

6. Within a few seconds the agent's phone should ring and they will be logged into ViciDial and can proceed as normal to take calls.

NOTES:
- You can also use phones entries to live monitor through the Real-time report. An example of this is given in Tutorial P.
- 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 ViciDial for these kinds of connections, as well as sample dialplan entries in the extensions.conf sample files.

B. 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 ViciDial server from the PSTN and be dialed out by your ViciDial server to go to the PSTN.

NOTES: 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 ViciDial service that provides carrier services(like vicihost.com) then you can skip this section.

1. Go to the ViciDial 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: ViciDial 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)

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.

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=friend" allows calls in from the carrier as well as out through the carrier
- "context=trunkinbound" this is 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 ViciDial 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
```

C. Create a campaign, load leads, add a list, add users and start dialing.

This tutorial covers going from a base ViciDial 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 ViciDial
   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 VICIDIAL 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 load leads.

5. 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 basic 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 ".xls". 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.

6. The 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
19. Date of Birth
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 ViciDial release(test_ViciDial_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
```

It is very important that you make sure every record has a list ID(third field) or that you enter a list ID number into the “list ID override” field on the lead loader page because you will not be able to dial the leads if the records are not associated with a list ID.

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

8. If you want to load all of the leads into the same list_id, or you did not put a list_id into your lead file, then you should enter your list_id number into the List ID Override field

9. If you want to load all of the leads with the same phone_code or you did not put a phone_codes into your lead file, then you should enter the phone_code in the Phone Code Override Field. In the USA and Canada this field should be 1. The phone_code field is required for ViciDial to work properly.

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

11. 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.

12. 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 areacodes and phone prefixes that can give you slightly better accuracy for setting of the timezones for leads. For more information on this contact the ViciDial Group at www.vicidial.com

13. 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.

14. 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

15. You now need to add the list for the leads that you just imported so click on the ADD A NEW LIST link.

16. 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

17. Then click submit, you should now see the stats of the list at the bottom of the screen and the number of leads you loaded should appear as a status of NEW.

18. Now that you have successfully imported leads, you need to create a vicidial 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.

19. For this tutorial we will fill in the following add user group fields with these values:
    Group: AGENTS
    Description: ViciDial AGENTS

20. 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.

21. Now that you have successfully created an agent user group, you need to create some ViciDial user accounts to allow agents to login to the ViciDial 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.

22. For this tutorial we will fill in the following add user fields with these values:
    User Number: 7777
    Password: test
    Full Name: test agent
    User Level: 1
    User Group: AGENTS
    <we will leave phone login and phone password blank for this tutorial>

23. Then 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.

24. 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.

25. 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 loaded or there is something wrong with your hopper loading script and you should contact your system administrator.

26. Now that you have leads in the hopper, you should have your agent log into the ViciDial client application: http://server-address/agc/vicidial.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 vicidial.php login screen with a pre-populated phone login. To do this just use "pl" and "pp" for the phone_login and phone_password fields:
vicidial.php?pl=phone1&pp=test

27. On the vicidial.php 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 A above

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

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

30. 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.

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

32. 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.

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

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

NOTES: 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 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.

D. Change your outbound dialing campaign to use Predictive Dialing

This tutorial will take the TESTCAMP campaign you set up in Tutorial C 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 ViciDial 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 vicidial.php client application, wait for the phone to ring and click on the “RESUME” button to start the dialer.

10. You can now open the “ViciDial 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 get more strict as the shift gets closer to the end of calling.

SOME NOTES ABOUT 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 in call performance.

E. Create an inbound-group, point a DID at it, and take calls

This Tutorial might possible 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 callerID delivery. In the last tutorial you just tested an outbound campaign and now you want to have your company's 800 number point to ViciDial so that you can have Agents answering inbound phone calls while also receiving callerID 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 ViciDial, take a look at tutorial B above.

2. To take inbound numbers into ViciDial you will need to first setup an inbound group(or in-group) in the ViciDial admin.php page.

3. Go to the IN-GROUPS section of the ViciDial 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
    Fronter 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 IN-GROUPS 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 ViciDial fronters
- 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, we want to 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>

NOTES:

- 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 ViciDial client application: http://server-address/agc/vicidial.php

14. On the vicidial.php 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 ViciDial 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 callerID and possibly name or location should appear in the vicidial 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 as.

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

F. Set up a remote agent to be able to take calls from the Inbound/Closer-enabled campaign.

This feature in ViciDial allows remote agents to login at the beginning of the day to an Inbound/Closer-enabled campaign and take inbound calls until they log back in 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.

1. Go to the REMOTE AGENTS section of the ViciDial admin website and click on the ADD NEW REMOTE AGENTS.

2. For this tutorial we will use the these values for the fields on the NEW REMOTE AGENTS form:
   User ID start: 7777 (this is the existing ID we created in Tutorial A)
   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)
   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

3. Have the agent login to the vdremote.php page to activate their session to take calls:
   http://server-address/vicidial/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 callerID 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.

G. 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 ViciDial system, then allow you to select from a list the audio prompt you want to play in each of the prompt fields in the ViciDial 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 ViciDial 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 ViciDial 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 ViciDial 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 ViciDial 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 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). 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.

H. 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. 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 is available for use with ViciDial is the Sangoma Netborder CPD(Call Progress Detection) which is a paid-for per-channel licensed solution that can give you up to 95% AMD accuracy as well as lower your dropped calls rate. For more information on this option, please read the Sangoma CPA page in this manual or contact the ViciDial Group at www.vicidial.com

If you do not have a default ViciDial installation or a ViciBox Server ISO install of ViciDial, 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)

```
; ViciDial_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 VICIDIAL
; 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 "extensions 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 ViciDial admin web site(vicidial/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 mode.

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 the 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 ViciDial-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 G above.

I. 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 phone line 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 C. We will also be using the remote agent that we set up in tutorial F 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 is 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 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.

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 is available for use with ViciDial is the Sangoma Netborder CPD(Call Progress Detection) which is a paid-for per-channel licensed solution that can give you up to 95% AMD accuracy. For more information on this option, please contact the ViciDial Group at www.vicidial.com

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 ViciDial 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 and following the beep you can start recording your message. We recommend that you wait 2-3 seconds of recording to start speaking so that the message doesn't start playing as soon as a person picks up the phone, also we recommend reading your message twice on the recording to make sure your customers get the message in it's entirety. When you are done recording you should 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 the prompt. 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 VICIDIAL
      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 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 => 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 promt(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 vicidial 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 8321, 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.

J. 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 – OPTIN (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 vicidial 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. 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 it normally does except that when a customer Answers they will be played the first prompt and will be expected to press a digit to indicate their answer to the question. If they do not press a digit and the No-Response action is set to OPTIN, 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.

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.

K. 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 E.

1. Go to the LISTS section of the vicidial admin pages and load leads into a new list just like we did in step 5 of tutorial C.

2. Make a new LIST for these new leads just like step 14 of tutorial C. We will use list ID 108 for this tutorial.

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 vicidial.php page 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 then that call will be sent to you after you finish the outbound call that you are on.

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.

L. Add a ViciDial 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 vicidial user from their home phone or mobile phone.

1. Go to the ViciDial 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)
   login: E7777
   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 vicidial admin.php

4. Have the agent log into the vicidial.php script with the phone login of "E7777" and phone password of "test".

5. Within a few seconds the agent's phone should ring and they will be logged into ViciDial and can proceed as normal to take calls.

M. Add a DID and point it to go to a specific logged-in ViciDial Agent

With ViciDial 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 ViciDial agent in the vicidial.php 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 3232. 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 vicidial.php 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.

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

If you want to use a Call Menu(otherwise known as IVR[Interactive Voice Response]) to give callers choices as to where to where their calls should be directed then you can use ViciDial Call Menus to offer choices to the callers and route their calls as well as track those calls. 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 IN-GROUPS 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 will 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.

O. Add a “If you know the extension...” option to a Call Menu with AGENTDIRECT DID entries

In this tutorial we will create DID entries for two agents that go to AGENTDIRECT in-groups and voicemail if they are unavailable. This will be added as an option to the WELCOME_MENU Call Menu that we just created in the tutorial above.

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,n,Goto(trunkinbound,${EXTEN},1)
```
NOTE: The above assumes 4-digit agent Ids(for the four X's)

6. Click on the “Add A New DID” link on the left sidebar, then put the following values in:
DID Extension: 7777
DID Description: agent 7777

7. 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: 7777
User Route Settings In-Group: AGENTDIRECT
User Unavailable Action: VOICEMAIL
Voicemail Box: 7777 <you need to go to Admin → Voicemail to create this voicemail box>
<we will leave the other fields in their default values>

8. 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. If you dial a different 4-digit number that is not in the DID listings, the call will be routed through the “default” DID entry.

P. 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 ViciDial 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 + areacode + number)
   voicemail box: 0
   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)
   login: monitor_cell
   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. Ensure that your user account has the settings “Agent API Access” and “View Reports” set to “1” in the User Modification page, and that the API is 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 34.

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.

REGULATIONS FOR THE USA: FTC 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 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.

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 a 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 November 2007, has over 146,000,000 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 ViciDial, you must filter your lists before you load them into the ViciDial system. There is an internal DNC feature to ViciDial, 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 ViciDial, 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 ViciDial, 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 ViciDial, 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 ViciDial, 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 ViciDial, these records are kept in the database indefinitely.

Other FTC Regulations

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

All outbound telemarketing calls must send an outbound CallerID number when calling consumers. This number must be active and must 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 ViciDial, use the “Campaign CallerID” field in the Campaign Detail screen to set the callerID 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 ViciDial, 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 to go into effect in September of 2009 that would outlaw 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 the time period before this rule goes into effect, there must be an opt-out option when placing these calls.

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 ViciDial 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 ViciDial, the above state call times are already included in the basic install of ViciDial. 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:

- **Martin Luter King Jr. Birthday** - January 16, Alabama/Louisiana/Rhode Island/Utah
- **President's Day** - February 20(3rd Monday in February), Alabama/Utah
- **Mardi Gras Day** - February 28 (can change every year), Alabama/Louisiana
- **Good Friday** - April 14 (changes every year), Louisiana
- **Confederate Memorial Day** - April 24(fourth Monday in April) , Alabama
- **Memorial Day** - May 29 (last Monday in May), Alabama/Louisiana/Rhode Island/Utah
- **Jefferson Davis' Birthday** - June 5, Alabama

- **Forth of July**- July 4, Alabama/Louisiana/Rhode Island/Utah and July 3 in Louisana
- **Pioneer Day** – July 24, Utah
- **Victory Day** - August 14, Rhode Island
- **Labor Day** – September 4 (first Monday in September), Alabama/Louisiana/Rhode Island/Utah
- **Columbus Day** – October 9 (second Monday in October), Alabama/Rhode Island/Utah
- **All Saints Day** - November 1, Louisana
- **Election Day** - November 7(always a Tuesday), Louisana/Rhode Island
- **Veterans Day** - November 10, Alabama/Louisana/Utah and November 11, Alabama/Rhode Island
- **Thanksgiving Day** – November 23 (fourth Thursday in November), Alabama/Louisiana/Rhode Island/Utah and the day after Thanksgiving, Louisiana
- **Christmas Day** – December 25, 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 ViciDial, 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 ViciDial, this is handled like the federal DNC list, you should be pre-filtering against these lists before the leads are loaded into ViciDial.

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 ViciDial, 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.

REGULATIONS IN OTHER COUNTRIES: UK, CANADA 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.

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

OVERVIEW OF ALL MANAGER SCREENS FUNCTIONS

In this section you will see in-depth descriptions of all of the screens in the realm of ViciDial Call 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.

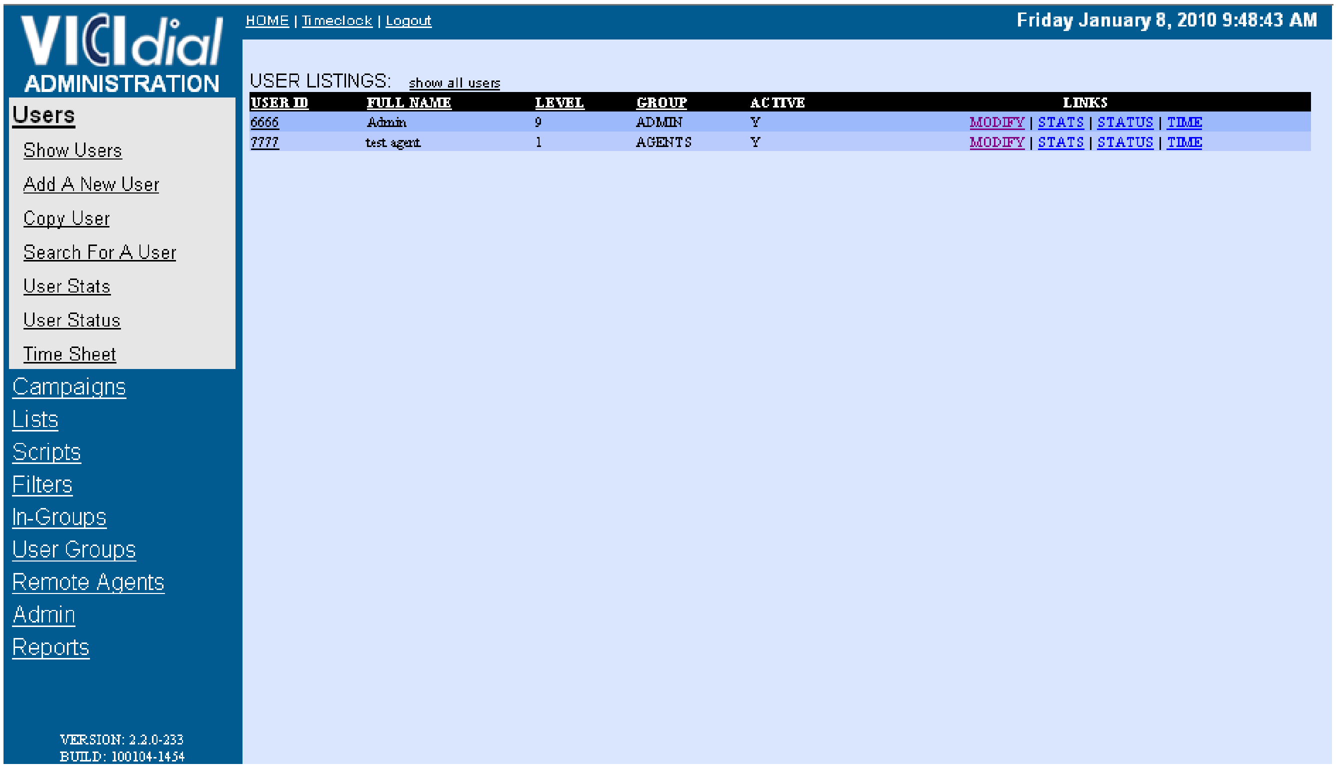


Figure 1. Vicidial Users List

VICIDIAL USERS

The very first screen you see when you log in to the ViciDial administration interface is the Users List. This is a full listing of every active ViciDial user in the system with their userID, 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, 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 ViciDial 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 userID, full name, password and user group or the submission will not be accepted. Also, please make sure that the user ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a user you will not be able to change that userID unless you delete the user and re-create it again with a different userID. You cannot have duplicate UserIDs in the system, and UserIDs must be between 2 and 8 characters in length.

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 vicidial.php. 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 setting are real-time, meaning that a manager can immediately use a new feature as soon as the feature has been enabled for their ViciDial user record.

Descriptions of ViciDial user fields

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

User ID - This field is where you put the ViciDial users ID number, can be up to 8 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.

Password - This field is where you put the ViciDial users password. Must be at least 2 characters in length with no spaces or punctuation of any kind. If your agents will be using the dial-in login feature, the password also needs to be digits(numbers) only.

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

User Level - This menu is where you select the ViciDial user's user level. Must be a level of 1 to log into ViciDial, 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.

User Group - This menu is where you select the ViciDial 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 ViciDial system, as well as define whether the agent must log into the timeclock before being allowed to log into ViciDial as an agent as well as Shift restrictions and defining whether the Agents 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 vicidial.php. This value will populate the phone_login automatically when the user logs in with their user-pass-campaign in the vicidial.php login screen. If you have agents that are always at the same phone you can use this option, otherwise leave it blank.

Phone Pass - Here is where you can set a default phone password value for when the user logs into vicidial.php. This value will populate the phone_pass automatically when the user logs in with their user-pass-campaign in the vicidial.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 VICIDIAL 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.

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

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

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 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 set to use all of the territories that they are set to belong to in the User Territories administrative section. This is a custom feature that will not work on most stock ViciDial installations.

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 vicidial.php in the campaign that they set the callback in. Default is 0-not active. Agent-only CallBack records can be overridden by a Manager after they have been set.

Agent Call Manual - This agent interface option allows an agent to manually enter a new lead into the system and call them, or to search for an existing lead and bring up that customer record and call them. This also allows the calling of any phone number from their ViciDial screen and puts that call into their session. Use this option with caution. Default is 0-not active.

Vicidial 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 ViciDial. This option must be on for ViciDial to follow the campaign recording option set in the campaign modification screen. Default is 1-active.

Vicidial 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 vicidial 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.

ViciDial Recording Override - This option will override whatever the option is in the campaign 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.

Agent Alter Customer Data Override - This option will override whatever the option is in the campaign 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 whatever the option is in the campaign for altering of customer phone number only. 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.

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

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.

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. 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.

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 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 ViciDial Agent screen web form addresses and scripts as "user_custom_one" and so on.

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

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.php. 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 campaign that an agent is logged into while they are logged into it. 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 vicidial 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 vicidial lists from the system. Default is 0-not active.

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

Modify Leads - This admin interface option, if set to 1, allows the user to modify leads in the admin section lead search results page. This must be active in order to modify the CallBack setting of a lead as well. Default is 0-not active.

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.

Modify Campaigns - This admin interface option, if set to 1, allows the user to modify vicidial 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 vicidial 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 vicidial 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 vicidial In-Groups from the system. Default is 0-not active.

Modify Remote Agents - This admin interface option, if set to 1, allows the user to modify vicidial 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 vicidial 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 vicidial 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 vicidial lead filters from the system. Default is 0-not active.

AGC Admin Access - This admin interface option, if set to 1, allows the user to login to the astGUIclient admin pages(astguiclient/admin.php) and alter records for phones and servers. Default is 0-not active.

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 vicidial call times records and vicidial state call times records from the system. Default is 0-not active.

Modify Servers - This option allows the user to view and modify the server settings in the Admin section. This includes trunk reservations. Default is 0.

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.

Agent API Access - This option allows the user account to be used with the ViciDial 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.

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.

Download Lists - This setting if set to 1 will allow a manager to click on the download list link at the bottom of a list modification screen to export the entire contents of a list to a flat data file. Default is 0.

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 VICIDIAL system.

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 userID, 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, userID, 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 vicidial.php. From this screen you can emergency log the agent out or log them in or out of the ViciDial Timeclock.

User Stats

This report will show the login times, calls taken by the agent and recordings made by the agent during the specified time frame as well as what they dispositioned those calls as.

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> 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.

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.

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.

Figure 2. Vicidial Campaigns List

VICIDIAL CAMPAIGNS

When you click on the CAMPAIGNS link at the top of the admin.php screen you will enter the Campaigns section. This starts with a full listing of every ViciDial campaign in the system with its campaign ID, name, active state, dial statuses and links to modification pages.

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, Pause Codes and List Mix. 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 ViciDial 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 does not have any spaces or punctuation, only letters or numbers, 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, it is not editable after initial submission, 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.

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

Active - This is where you set the campaign to Active or Inactive. If Inactive, no agents can log into it.

Park Extension - This is where you can customize the on-hold music for ViciDial. Make sure the extension is in place in the extensions.conf and that it points to the filename below. You can leave this field blank.

Park File Name - This is where you can customize the on-hold music for ViciDial. Make sure the filename is 10 characters in length or less and that the file is in place in the /var/lib/asterisk/sounds directory. You can 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. 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:
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.

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 ViciDial closer. Setting this to Y will make the Allowed Closers section appear at the bottom of the Campaign options screen upon submit. If this is set to N then there will be no options to transfer a call to another agent on the ViciDial system

Allow Inbound and Blended - This is where you can set whether the users of this campaign will have the option to take calls from inbound sources like ViciDial fronters and calls coming in from an outside line. Setting this 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 "Ad a Dial Status" 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 vicidial_list table
- UP: select the last leads loaded into the vicidial_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 3nd 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 forth 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 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.

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".

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.

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 two minutes. 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.

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. If INBOUND_MAN then the auto_dial_level should be locked at 1 and no outbound automated calls will be placed. This dial method allows for agentss to dial Manually through a list while still being able to receive inbound phone calls. 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 first half of the shift(as defined by call_time selected for campaign) and gets more strict as the shift goes on. ADAPT_AVERAGE tries to maintain an average or the dropped percentage not imposing hard limits as aggressively as the other two 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.

Auto Dial Level - This is where you set how many lines ViciDial should use per active agent. zero 0 means auto dialing is off and the agents will click to dial each number. Otherwise ViciDial 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.

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.

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 FTP regulations is 3%.

Maximum Adapt Dial Level - This field is where you set the limit of 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 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 by how long you have 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.

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.

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 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.

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.

Next Agent Call - This determines which agent receives the next call that is available:
- random: orders by the random update value in the vicidial_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 vicidial_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.
- 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

Local Call Time - This is where you set during which hours you would like to dial, as determined by the local time in the area in which 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.

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.

Omit Phone Code - This field allows you to leave out the phone_code field while dialing within ViciDial. 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 CallerID - 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 0000000000. 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 by your carrier, 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 ViciDial 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 your Asterisk server is running Asterisk@Home, Trixbox or FreePBX, you may have issues with sending a callerID properly, if you run into problems you should contact your system administrator. USA FTC regulations require the sending of a valid callerID number on outbound business to consumer calls.

Campaign VDAD 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
- 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

Campaign Rec extension - This field allows for a custom recording extension to be used with ViciDial. 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 exten 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 CUSTPHONE FULLDATE TINYDATE EPOCH AGENT. 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. 50 char max. It is best not to have any spaces or wild card characters in this field.

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.

Campaign 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".

Get Call Launch - This menu allows you to choose whether you want to auto-launch the WEBFORM page in a separate window, auto-switch to the SCRIPT tab or do nothing(NONE) when a call is sent to the agent for this campaign.

Answering Machine Message - This field is for entering in an extension to blind transfer calls to when the agent gets an answering machine and clicks on the Answering Machine Message button in the transfer-conference frame. You or your system administrator must set this exten up in the dialplan(extensions.conf) and make sure it plays an audio file then hangs up.

WaitForSilence Options - If Wait For Silence is desired on calls that are detected as Answering Machines then this field has those options. There are two settings separated by a comma, the first option is how long to detect silence in milliseconds and the second option is for how many times to detect that before playing the message. Default is EMPTY for disabled. A standard value for this would be wait for 2 seconds of silence twice: 2000,2

AMD send to vm exten - This menu allows you to define whether a message is left on an answering machine when it is detected. the call will be immediately forwarded to the Answering-Machine-

Message extension if AMD is active and it is determined that the call is an answering machine.

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 vicidial.php script 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 ViciDial AGI script for logging or an IVR, then place AXFER in the number-to-dial field. You can also specify an 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.

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.

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.

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.

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.

CPD AMD Action - If you are using the Sangoma ParaXip Netborder Call Progress Detection software then you will want to enable this setting either 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 MESSAGE which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED.

Agent 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. This works in both manual dial and auto dial mode.

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 ViciDial 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 vicidial user options for Agent only callbacks should be enabled.

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, 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 and IN_GROUP will send the call to the Inbound Group that is defined below.

Voicemail - If defined, calls that would normally DROP would instead be directed to this voicemail box to hear and leave a message.

Safe Harbor Message - If set to Y will play a message to customer after the Drop Call Seconds timeout is reached without being transferred to an agent. This setting will override sending to a voicemail box if this is set to Y. Must set to Y to be in compliance with USA FTC safe-harbor regulations on business to consumer calls.

Safe Harbor Exten - This is the dialplan extension that the desired Safe Harbor audio file is located at on your server.

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.

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.

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.

Agent Pause Codes Active - Allows agents to select a pause code when they click on the PAUSE button in vicidial.php. Pause codes are definable per campaign at the bottom of the campaign view detail screen and they are stored in the vicidial_agent_log table. FORCE will force the agents to choose a PAUSE code if they click on the PAUSE button. Default is N.

Campaign Stats Refresh - This checkbox will allow you to force a ViciDial stats refresh, even if the campaign is not active. The ViciDial stats are shown on the campaign real-time report(AST_timeonVDADall.php).

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 Number - If set to Y, The customer phone number will be displayed in a non-editable text field on the agent screen. Default is N.

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.

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. Default is NONE for 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 Terriories must be enabled in the System Settings.

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.

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.

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.

Manual Dial List ID - The default list_id to be used when an agent placces a manual call and a new lead record is created in vicidial_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.

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.

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.

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.

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 callerIDs 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.

Agent Screen Extended Alt Dial – This feature is currently not active

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 vicidial 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 VICIDIAL. Default is Y. The NEW_WINDOW option will open a new window upon login to the VICIDIAL 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 VICIDIAL call after it has been dispositioned. Default is N.

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. The Start URL does not work for Manual dial calls. 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 and talk_time 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. This URL can NOT be a relative path. Default is blank.

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.

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.

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 "Selectable" field defines whether it shows up in the vicidial.php client screen 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.

Campaign Hotkeys

Through the use of custom campaign hotkeys, agents that use the vicidial 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 ViciDial 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 i it is enabled for a campaign, ALTPH2 - Alternate Phone Hot Dial and ADDR3-----Address3 Hot Dial allow an agent to use a hotkey to hangup their call, stay on the same lead, and dial another contact number from that lead.

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 dialable 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 Statuses

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.

Agent Pause Codes

If the 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 vicidial 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. You can see statistics on Agent pause code time in the Agent Performance Detail report.

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 G 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

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 VICIDIAL internal DNC list and possibly the campaign-specific DNC list.

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.

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.

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.

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. If the customer does not press a digit and the No-Response action is set to OPTIN, 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 will be hung up.

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.

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.

Campaign List Mix

Campaign List Mix is a feature that is not enabled by default, Your administrator needs to activate it on the server before you can use it. 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 that come up 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 or 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.

List Order 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.

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.

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 it and will stop all sending of calls to agents(until they login again). Use this feature with caution. This feature does not properly log their logout time and it for use only after a shift is supposed to have ended and agents have forgotten to log out, or if 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.

Campaign Stats

There are several included Real-time and Summary/History reports for statistics on ViciDial Campaigns accessible through the administration web pages. More information on those reports is covered in later chapters of this manual.

Real-time Campaign Stats

From the Campaign Modification screen you can click on the Real-time link at the top of the page 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.

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.

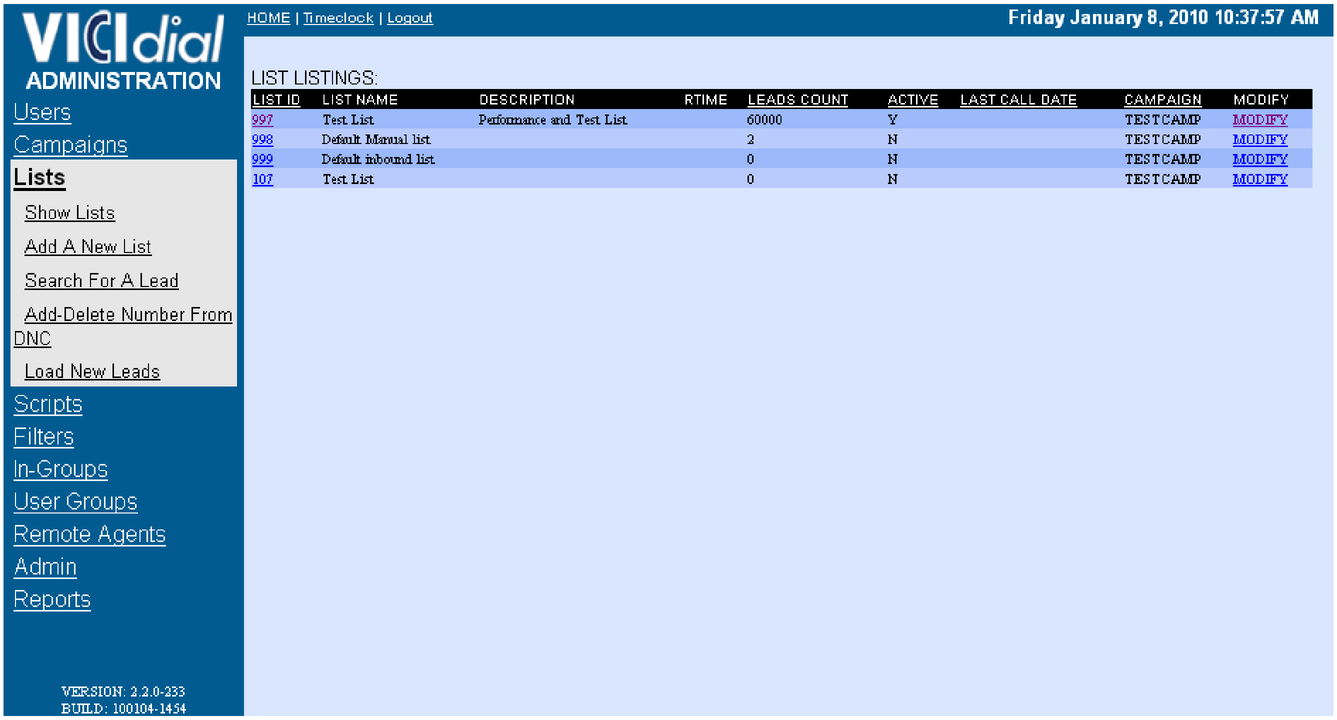


Figure 3. Vicidial Lists List

VICIDIAL LISTS

When you click on the LISTS link at the top of the admin.php screen you will enter the Lists section. This starts with a full listing of every vicidial list in the system with their list ID, name, campaign that they are associated with, active state and a link to the list modification page. We will first look at adding a new list.

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. 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 2 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 is not editable after initial submission, must contain only numbers and must be between 2 and 8 characters in length. The List ID must be greater than 99.

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.

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.

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 deleted 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.

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.

Campaign CID Override - If this field is set, this will override the campaign CallerID that is set for calls that are placed to leads in this list. Default is not set.

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.

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.

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. The second set of stats is a breakdown of leads by timezone and whether they have been called of not. The third 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

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, the vendor lead code or a system lead ID. 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.

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 or ANYONE). Also on this page is a call history for this lead and a recording history for this lead, both including the user ID.

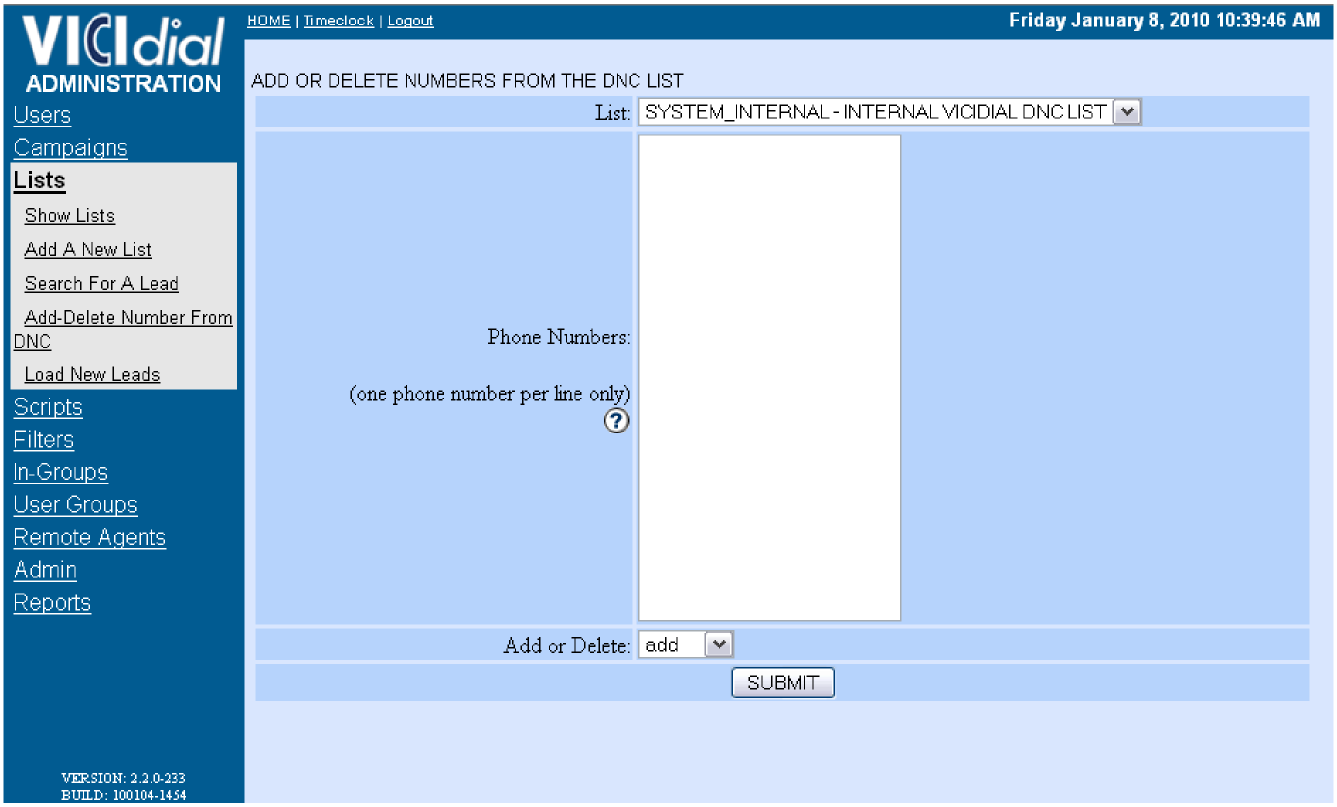


Figure 4. Add a Number to the Vicidial DNC List

Add or Delete Numbers to/from the Internal and campaign DNC Lists

ViciDial 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 NUMBER TO DNC 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. To use this functionality you must have the proper permissions in the User settings.

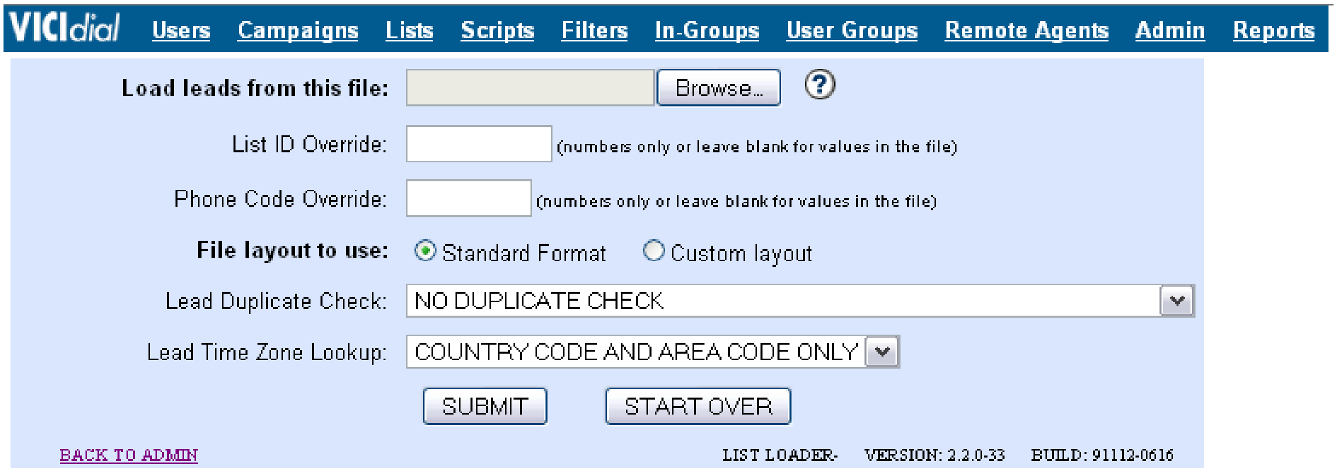


Figure 5. Super Lead Loader Main Screen

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 vicidial_list table.

Loading New Leads

If your account has permissions for it, you can load leads into the vicidial 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 ViciDial web-based lead loader is designed simply to take a lead file - up to 8MB in size typically - that is either tab or pipe delimited and load it into the vicidial_list table. The lead loader does not do 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. 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. 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.

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.

The basic lead loader takes only text files in this specific format:

```
 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
```

There is also an option that allows for field choosing and TXT- Plain Text, CSV- Comma Separated Values and XLS- 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". To use the this option you will need to select your file and then select whether you want to use the standard format(mention above) or if you want to use the custom format. 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 vicidial fields and then click submit to load the file in.

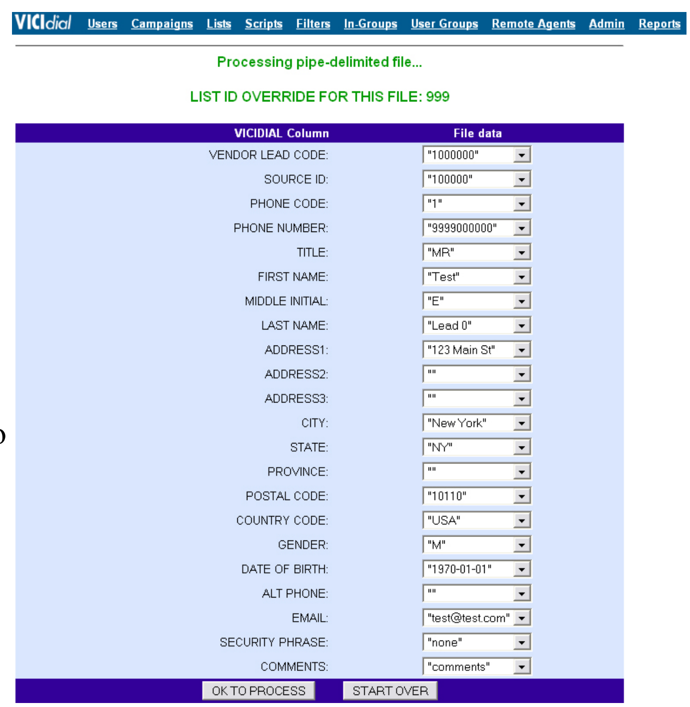


Figure 6. Super Lead Loader Field Chooser

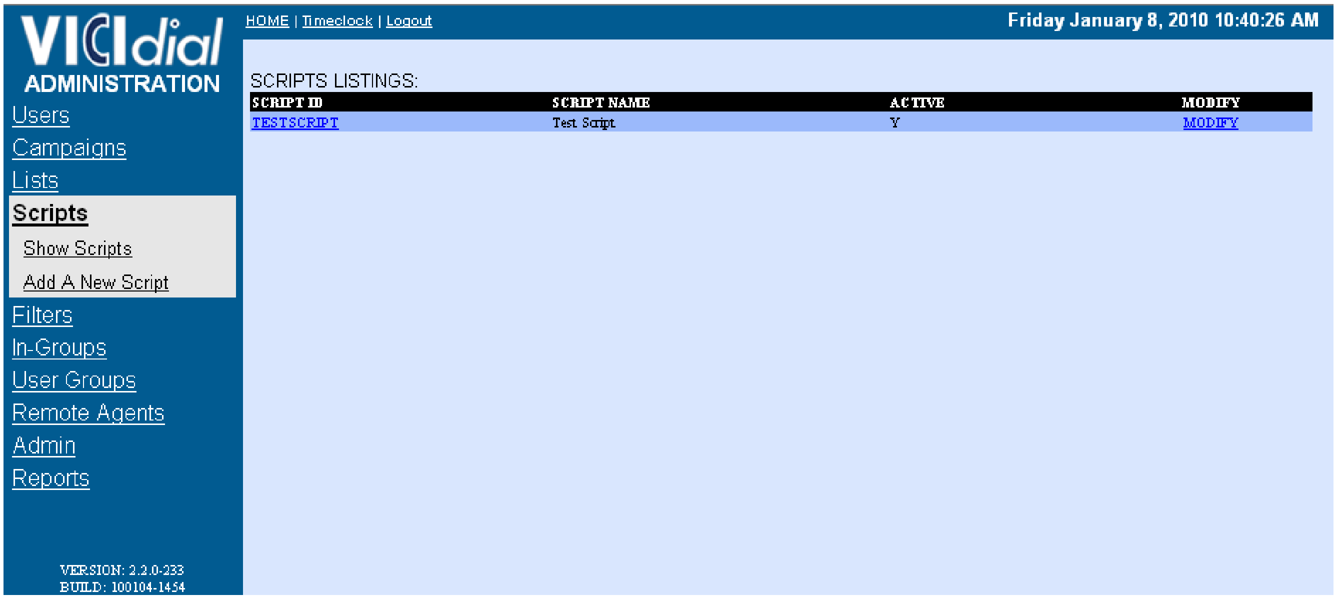


Figure 7. Vicidial Scripts List

VICIDIAL SCRIPTS

When you click on the SCRIPTS link at the top of the admin.php screen you will enter the Scripts section. This starts with a full listing of every vicidial 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 ViciDial 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 Vicidial Script. This needs to be a unique identifier. Do not to use any spaces or punctuation for this field. max 10 characters, minimum of 2 characters.

Script Name - This is the title of a Vicidial 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 Vicidial Script such as "changed to free upgrade on Sept 23". Maximum 255 characters, minimum of 2 characters.

Script Text - This is where you place the content of a Vicidial Script. Minimum of 2 characters. In addition to being able to use basic HTML tags, you can have customer information be auto-populated in this script using "--A--field--B--" where field is one of the following field names: 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. 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_ViciDial_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>
```

Active - This determines whether this script can be selected to be used by a campaign.

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.

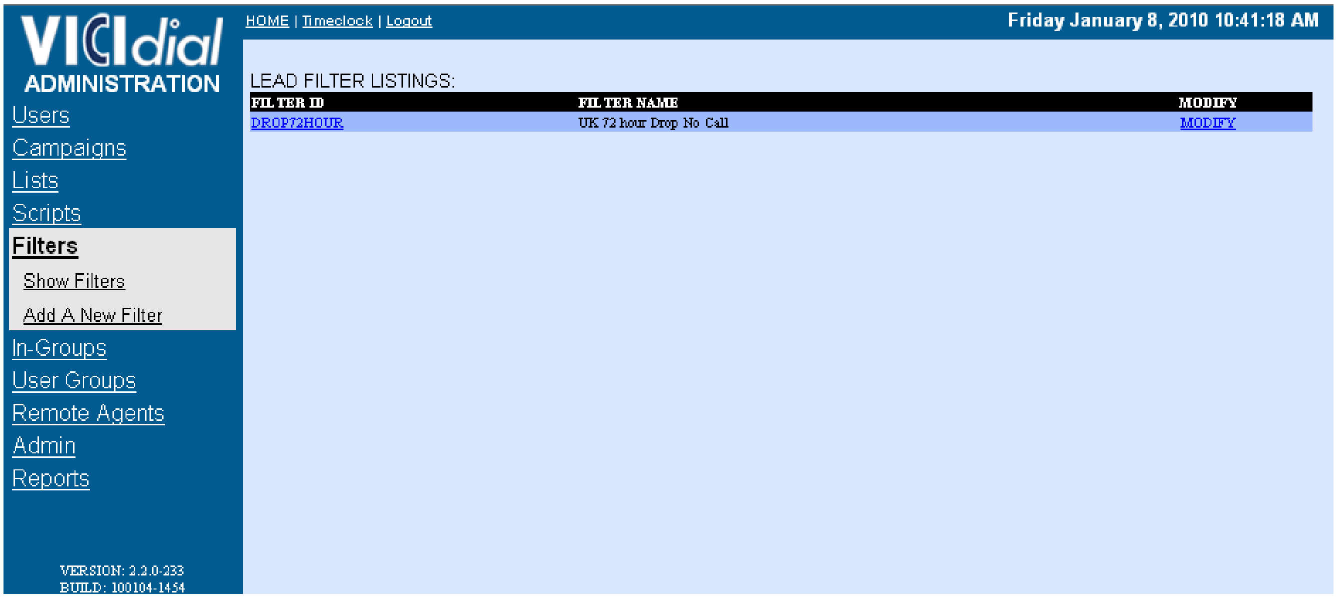


Figure 8. Vicidial Filters List

VICIDIAL FILTERS

Filters allow you to more finely select the leads that you want to call in your outbound dialing campaign. 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 at the top of the admin.php screen you will enter the Filters section. This starts with a full listing of every vicidial 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.

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 Vicidial Lead Filter. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 10 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 Vicidial Filter such as "calls all California leads". Maximum 255 characters, minimum of 2 characters.

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.

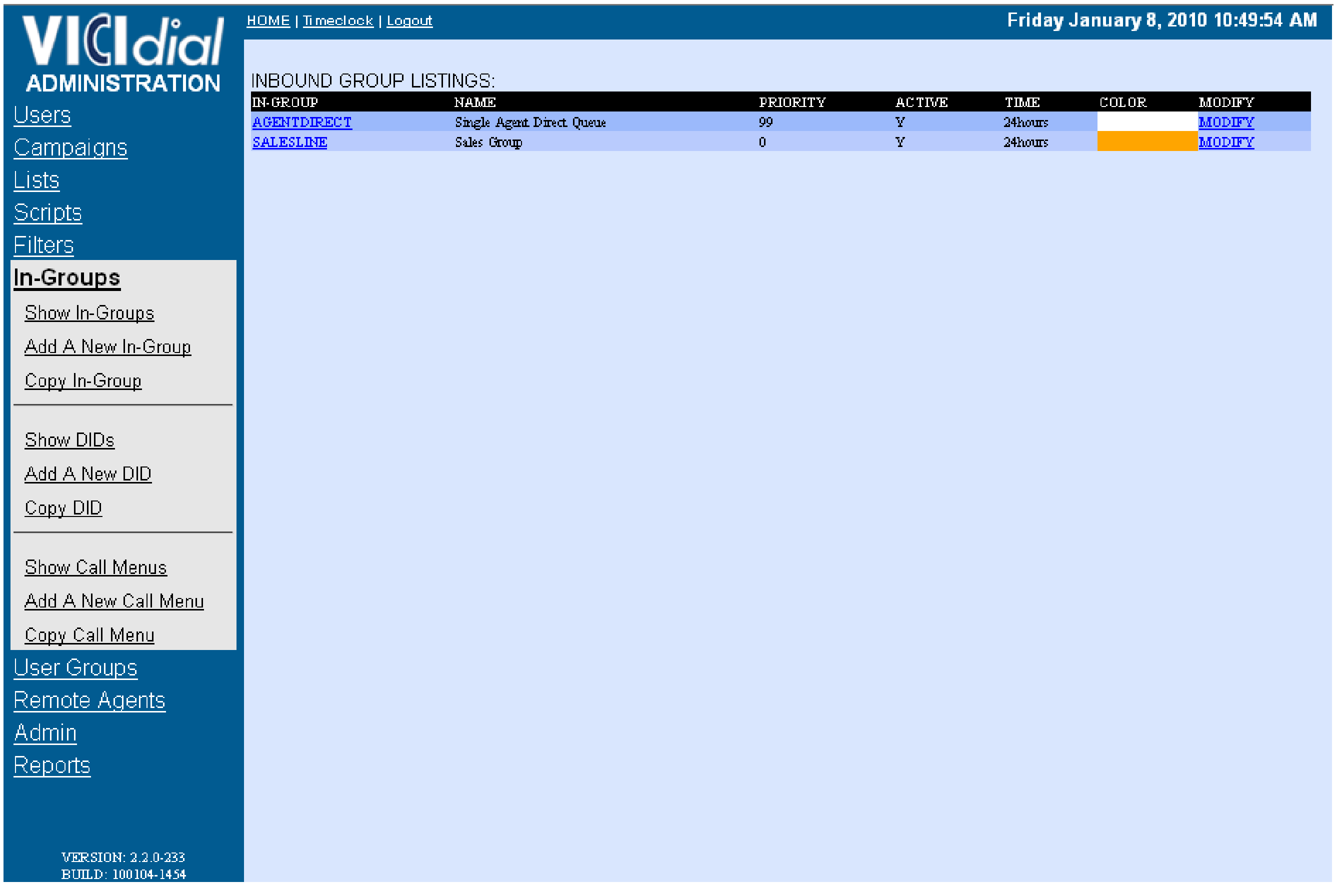


Figure 9. Vicidial In-Groups List

VICIDIAL IN-GROUPS

In-groups allow you to set up many different groupings of inbound numbers(DIDs) and closer groups (to take calls from fronters on other ViciDial campaigns). In order for inbound and closer calls to get to a ViciDial agent you have to set up an In-group.

When you click on the IN-GROUPS link at the top of the admin.php screen you will enter the In-groups section. This starts with a full listing of every ViciDial inbound group in the system with their in-group ID, name, active status, vmail transfer extension(if set), in-group display color and a link to the in-group modification page. We will first look at adding a new in-group.

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 "_". 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. You cannot have duplicate in-group IDs in the system, an in-group cannot be the same name as a campaign either, and 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 match up with the first variable in the dialplan for an inbound call.

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 ViciDial 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 ViciDial will not work properly.

Active - This determines whether this group shows up in the selection box when a ViciDial agent logs in.

Web Form - This is the custom address that clicking on the WEB FORM button in ViciDial 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 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--
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 agent receives the next call that is available:
  - random: orders by the random update value in the vicidial_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 vicidial_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.

 - fewest_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
 - campaign_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
 - 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.

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 and possibly outbound campaign calls if this is a blended campaign.

Fronter Display - This field determines whether the inbound ViciDial agent would have the fronter name, if there is one, displayed in the Status field when the call comes to the agent.

In-Group 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 in-group.

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 tab or do nothing when a call is sent to the agent for this campaign.

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 ViciDial 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 ViciDial AGI script for logging or an IVR, then place AXFER in the number-to-dial field. You can also specify an 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 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. This setting will override the Campaign settings.

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.

Drop Call Seconds - The number of seconds from the time the customer line is picked up until the call is considered a DROP.

Voicemail - If defined, calls that would normally DROP would instead be directed to this voicemail box to hear and leave a message.

Drop 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, 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 and IN_GROUP will send the call to the Inbound Group that is defined below.

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.

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.

Default Group Alias - If you have allowed Group Aliases for the campaign that the agent is logged into 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.

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.

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, MESSASGE will play the file in the After Hours Message Filenam 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 select list. Default is MESSAGE.

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.

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.

No Agents No Queueing - If this field is set to Y 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. Default is N.

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.

No Agent No Queue Action Value - This is the value for the Action above. Default is nbdy-avail-to-take-call|vm-goodbye.

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---

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.

On Hold Prompt Interval - The length of time in seconds to wait before playing the on hold prompt. Default is 60.

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.

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.

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.

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 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 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 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.

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.

In-Group Recording Override - This field allows for the overriding of the campaign call recording setting. This setting can be overridden by the vicidial_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 CUSTPHONE FULLDATE TINYDATE EPOCH AGENT. 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. 50 char max. Default is NONE.

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 and attempt to send the call right to an agent. Does not override welcome message or on hold prompt settings. Default is N.

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.

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. 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 and talk_time 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. Default is blank.

Default Group Alias - If you have allowed Group Aliases for the campaign that the agent is logged into 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.

Inbound Group Agent Rank and Call Count

At the bottom of the in-group modification screen there is a section that shows the ranks for all agents for the in-group and the number of calls that each agent has taken in from that in-group for the day

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.

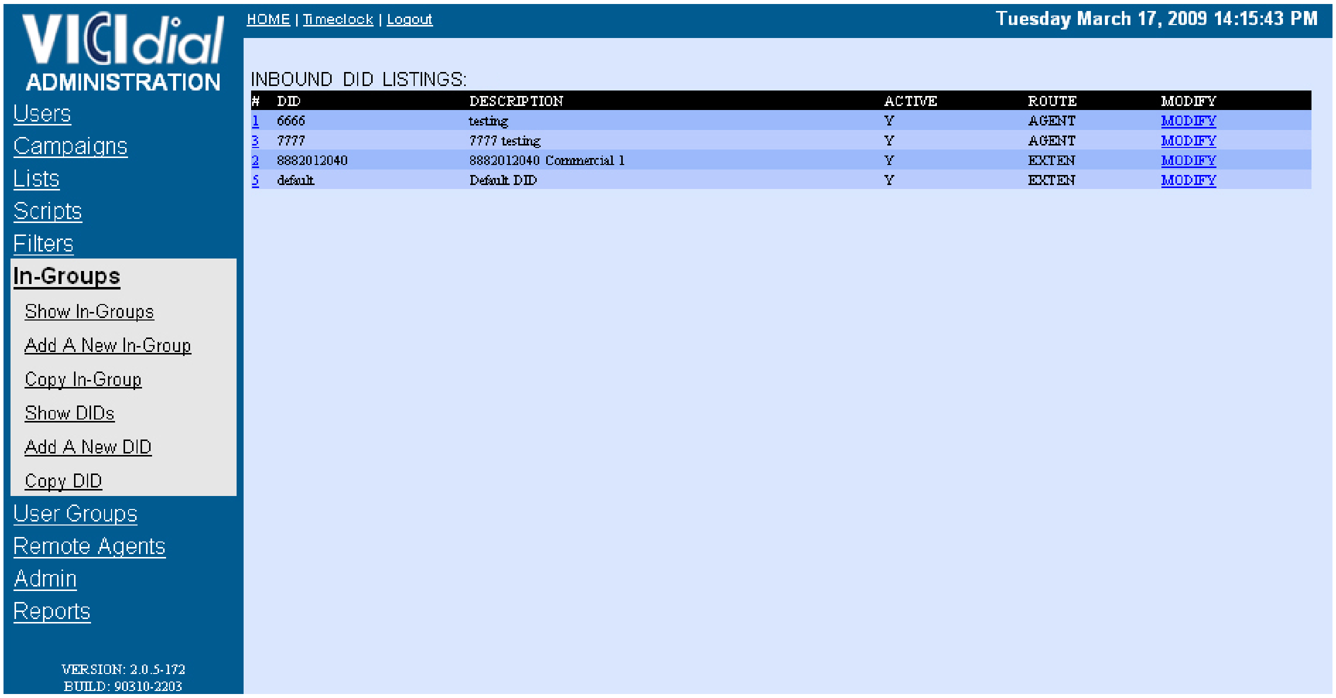


Figure 10. Vicidial DIDs

VICIDIAL INBOUND DIDS

Also in the In-Groups 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).

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 make sure 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 that 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)
- Users logged into ViciDial as agents so the calls can only be answered by them
- Phones that are specified in the ViciDial interface
- ViciDial In-Groups
- ViciDial Call Menus

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 allows you to send any call that does not match any other existing patterns to the default DID.

DID Description - This is the description of the DID routing entry.

DID Active - This the field where you set the DID entry to active or not. Default is Y.

DID Route - This 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 VICIDIAL agent if they are logged in, PHONE will send the call to a phones 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.

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.

Extension Context - If EXTEN is selected as the DID Route, then this is the dialplan context that calls will be sent to. 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 VICIDIAL Agent that calls will be sent to. 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 CallerID as the phone number, CIDLOOKUP will attempt to lookup the phone number by the CallerID in the entire system, CIDLOOKUPRL will attampt to lookup the phone number by the CallerID in only one specified list, CIDLOOKUPRC will attampt to lookup the phone number by the CallerID in all of the lists that belong to the specified campaign, CLOSER is specified for VICIDIAL 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 attampt 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 CallerID 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.

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 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.

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.

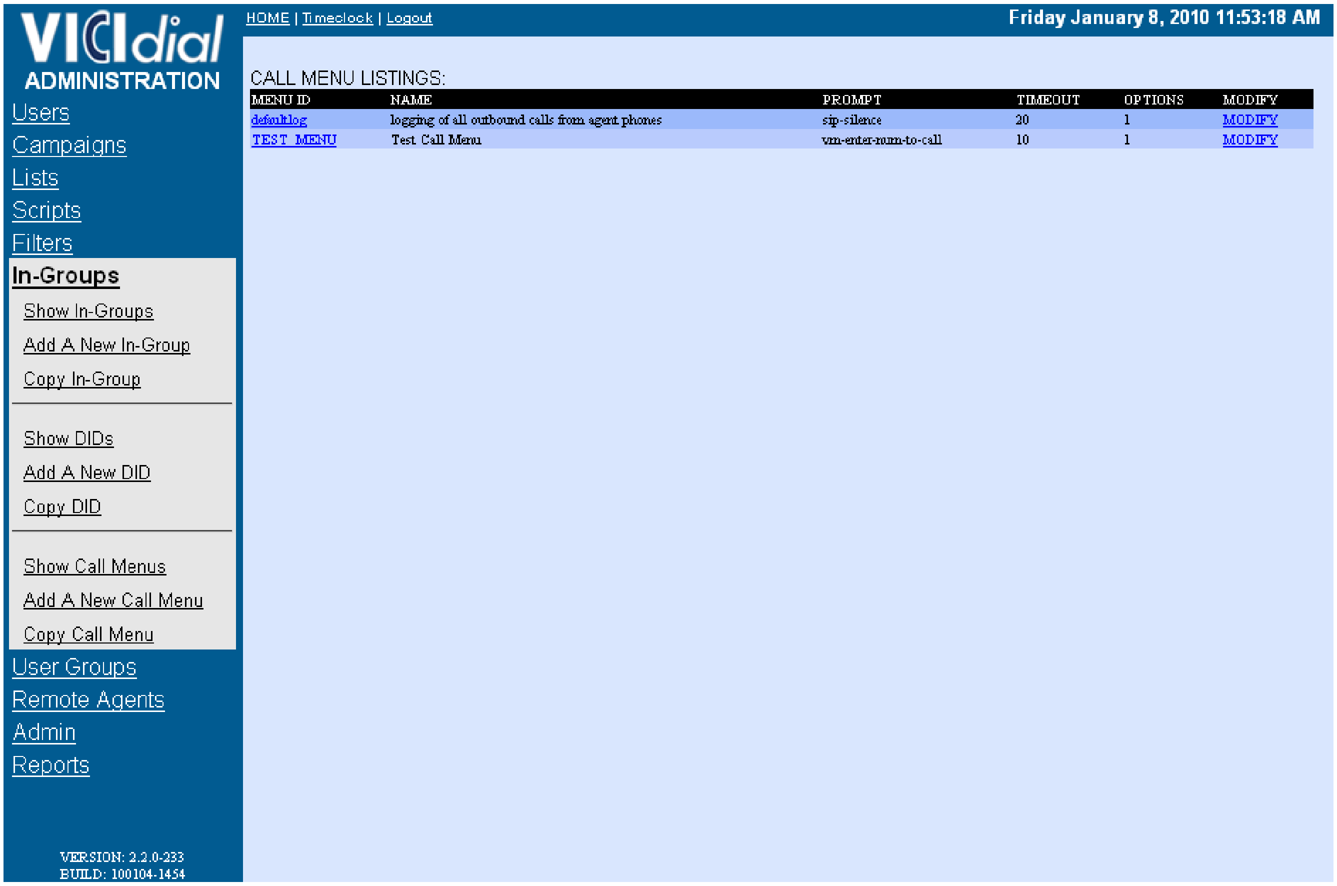


Figure 11. ViciDial Call Menus List

VICIDIAL CALL MENUS

Also in the In-Groups section are the Call Menu functions which give you the ability to create treed IVR(Interactive Voice Response) Menus, for instance: “Press 1 for sales or press 2 for technical support”.

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 IN-GROUPS 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 ViciDial interface
- ViciDial In-Groups
- ViciDial Call Menus

- ViciDial DIDs
- Any AGI script on the system
- Hangup after playing a message

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.

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.

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 ID - 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.

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.

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. 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, the Route Value needs to be the voicemail box number, the unavailable message will be played. For AGI, the Route Value needs to be the agi script and any values that need to be passed to it.

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.

Custom Dialplan Entry - This field allows you to enter in any dialplan elements that you want for the Call Menu.

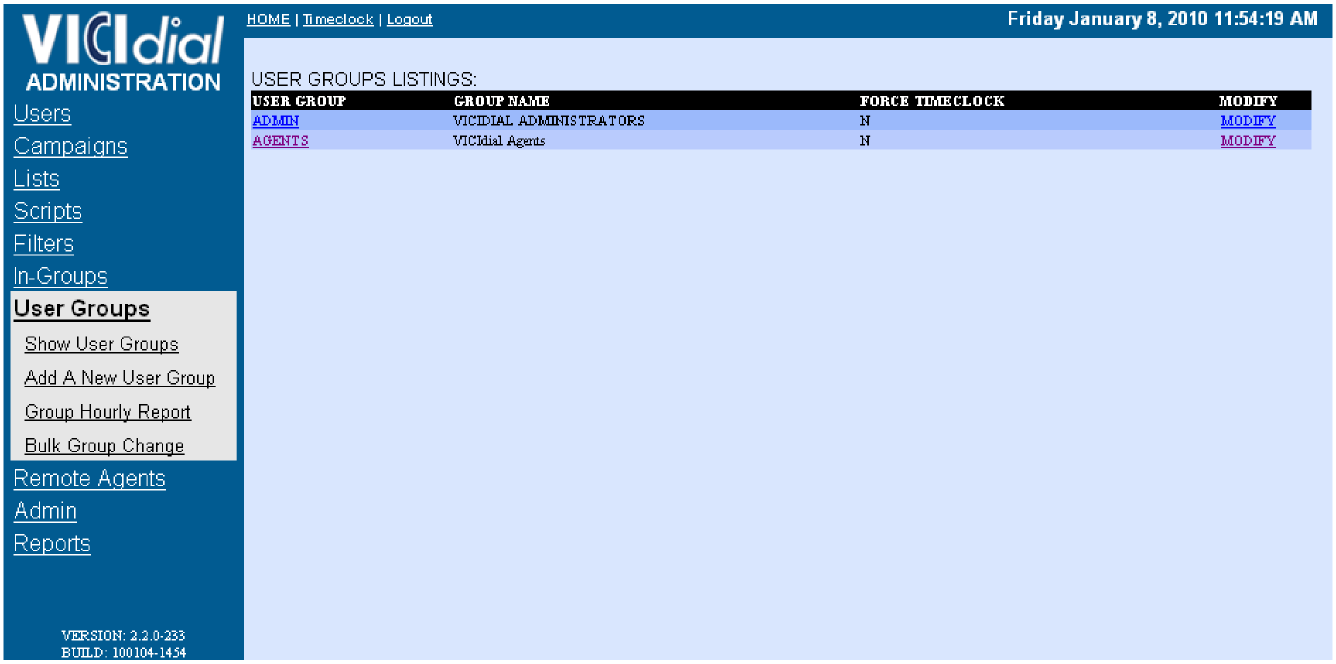


Figure 12. Vicidial User Groups List

VICIDIAL USER GROUPS

User Groups currently are used only for easier searching of ViciDial users, as well as within the hourly stats report. They are also in place for some future functionality that will allow different features or permissions per user group.

When you click on the USER GROUPS link at the top of the admin.php screen you will enter the User Groups section. This starts with a full listing of every ViciDial 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 ViciDial User group, try not to use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

Group Name - This is the description of the ViciDial user group max of 40 characters.

Force Timeclock Login - This option allows you to not let an agent log in to the VICIDIAL 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.

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.

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.

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.

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.

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

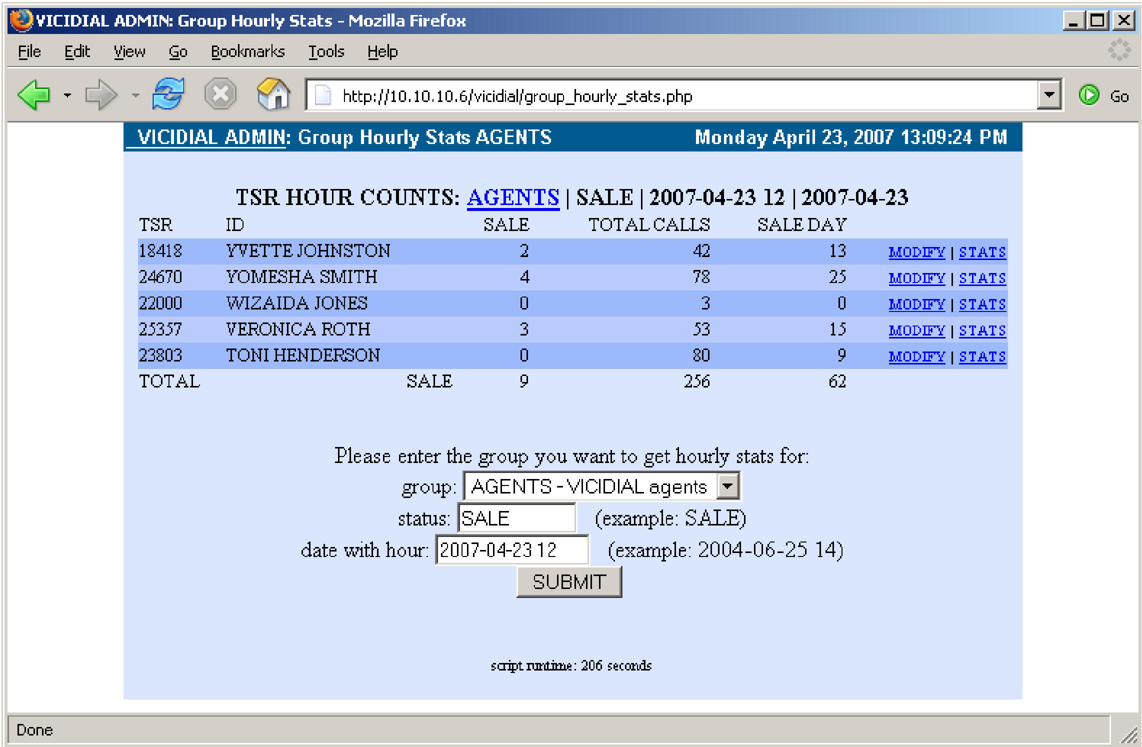


Figure 13. Vicidial User Group, Group Hourly Report

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.

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.

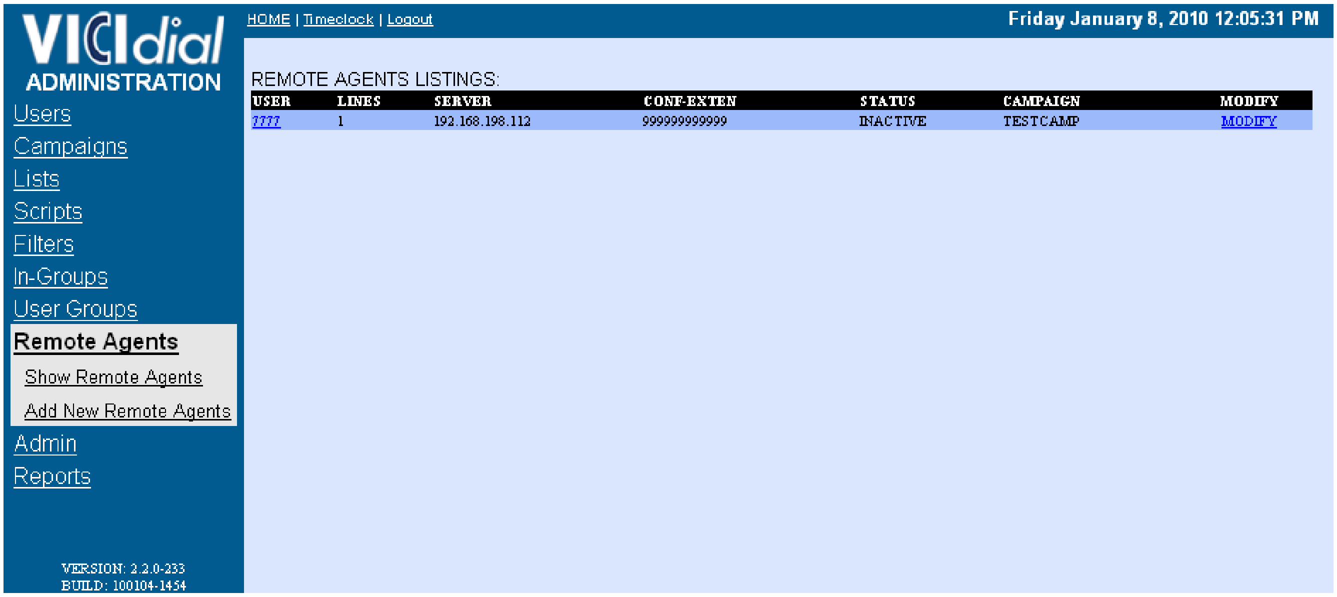


Figure 14. Vicidial Remote Agents List

VICIDIAL REMOTE AGENTS

There are two recommended uses for Remote Agents in ViciDial. 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 screen to use the ViciDial client application. Second, remote agents accounts can be used to do outbound auto-dial message-playing campaigns. Setting up and running both of these scenarios are presented later on 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 ViciDial, they can log in as a standard agent.

When you click on the REMOTE AGENTS link at the top of the admin.php screen you will enter the Remote Agents section. This starts with a full listing of every ViciDial remote agent in the system with their Agent ID, number of lines, client server IP address, outgoing phone number for the agent, 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.

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 ViciDial. 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 ViciDial 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 ViciDial 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. 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 ViciDial user account with a user level of 4 or great if you want them to be able to use the vdremote.php page for remote web access of this account.

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, here is where you select which server you want.

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.

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.

Inbound Groups - Here is where you select the inbound groups you want it to receive calls from if you have selected a CLOSER campaign.

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.

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 EXTERNAL agents that would be using their own phones at home either through VOIP or their regular phone lines. Every ViciDial seat must have a phone entry in order to login to the ViciDial client. The exception to this is if you have the CALL-IN feature enabled on your ViciDial system that allows agents to dial into the ViciDial 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 at the top of the admin.php screen you will enter the Higher-level ViciDial Admin section. This starts with the second sub-section selected which is the Phones sub-section with a full listing of every ViciDial phone record in the system with their phone extension, protocol, server IP, status, and voicemail messages count and a link to the phone modification page. We will first look at adding a new phone. If you would like to be able to delete a phone record, you must use a ViciDial USER record and you must have the "AGC Delete Phones" field set to "1" for your ViciDial USER.

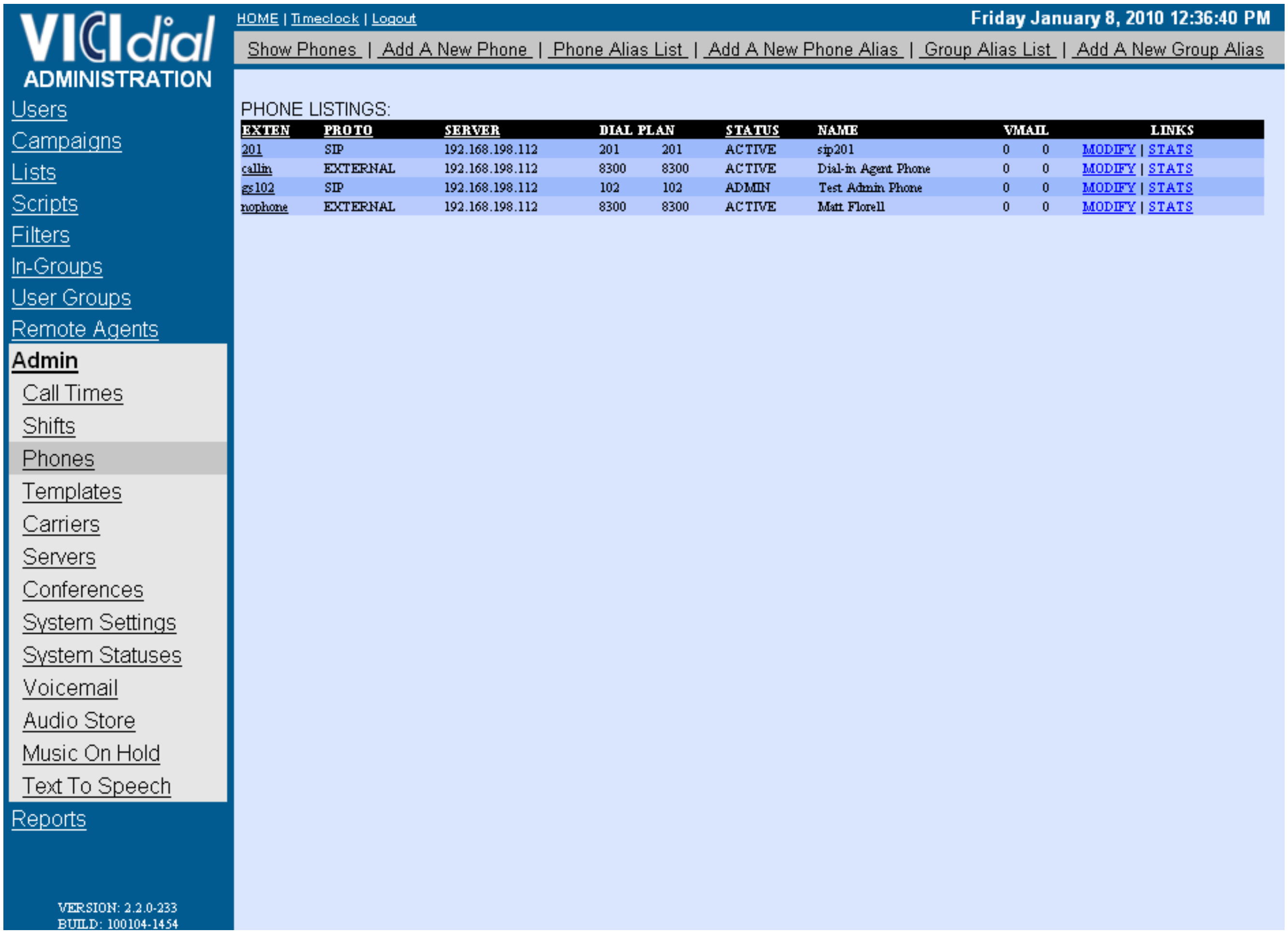


Figure 15. Admin Phones List

ADMIN - PHONES

Add a New Phone

You can get to the Add Phone screen by clicking on the "ADD A NEW PHONE" link at the top 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 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 “Conf File Secret” field, not the password field.

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).

Dialplan 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 astGUIclient web-client app.

Outbound CallerID - This field is where you would enter the callerID number that you would like to appear on outbound calls placed form the astguiclient web-client. This does not work on RBS, non-PRI, T1/E1s or POTS telephone lines.

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.

Login - The login used for the phone user to login to the client applications.

Password - The password used for the phone user to login to the 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 Conf File Secret field further down on this page.

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

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.

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, 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 ViciDial 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.

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.

ViciDial Default User - This is to place a default value in the ViciDial user field whenever this phone user opens the ViciDial client application. Leave blank for no user.

ViciDial Default Pass - This is to place a default value in the ViciDial password field whenever this phone user opens the ViciDial client application. Leave blank for no pass.

ViciDial Default Campaign - This is to place a default value in the ViciDial campaign field whenever this phone user opens the ViciDial 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 you change this.

Conf Exten - This is the default Conference park extension for the client applications. Verify that a different one works before you change this.

ViciDial Park Exten - This is the default Parking extension for ViciDial client applications. Verify that a different one works before you change this.

ViciDial Park File - This is the default ViciDial park extension file name for the client applications. Verify that a different one works before you change this. 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.

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 - 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 ViciDial applicaiton for example, then you would set this field to a dialplan context that does not exist, something like agent-nodial. default is default.

Conf File Secret - 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.

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 ViciDial installations you will not need to set this field.

Browser Location - This is applicable to only UNIX/LINUX clients, the absolute path to Mozilla or Firefox browser on the machine. verify this by launching it manually. NOT USED ANYMORE.

Install Directory - Depricated. FIELDNOT USED ANYMORE.

CallerID URL - This is the web address of the page used to do custom callerID lookups in the astguiclient web-client application. default testing address is: http://astguiclient.sf.net/test_callerid_output.php

ViciDial Default URL - This is the web address of the page used to do custom ViciDial Web Form queries. default testing address is: http://astguiclient.sf.net/test_ViciDial_output.php

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 ViciDial features to work properly. NOT USED ANYMORE.

User Switching - Set to true to allow user to switch to another user 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 astguiclient 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 ViciDial 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 astguiclient 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 ViciDial 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 ViciDial 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 ViciDial. Feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

DBX Server - The MySQL database server that this user should be connecting to.

DBX Database - The MySQL database that this user should be connecting to. Default is asterisk.

DBX User - The MySQL user login that this user should be using when connecting. Default is cron.

DBX Pass - The MySQL user password that this user should be using when connecting. Default is 1234.

DBX Port - The MySQL TCP port that this user should be using when connecting. Default is 3306.

DBY Server - The MySQL database server that this user should be connecting to. Secondary server, not used currently.

DBY Database - The MySQL database that this user should be connecting to. Default is asterisk. Secondary server, not used currently.

DBY User - The MySQL user login that this user should be using when connecting. Default is cron. Secondary server, not used currently.

DBY Pass - The MySQL user password that this user should be using when connecting. Default is 1234. Secondary server, not used currently.

DBY Port - The MySQL TCP port that this user should be using when connecting. Default is 3306. Secondary server, not used currently.

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_vicidial_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 ViciDial agents

The Call-In feature allows agents to dial into the ViciDial 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 vicidial.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 ViciDial this way they will need to have ViciDial user IDs and passwords that are only made up of digits, no letters or special characters.

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 ViciDial admin pages using your vicidial USER account that has permissions to delete phone entries.

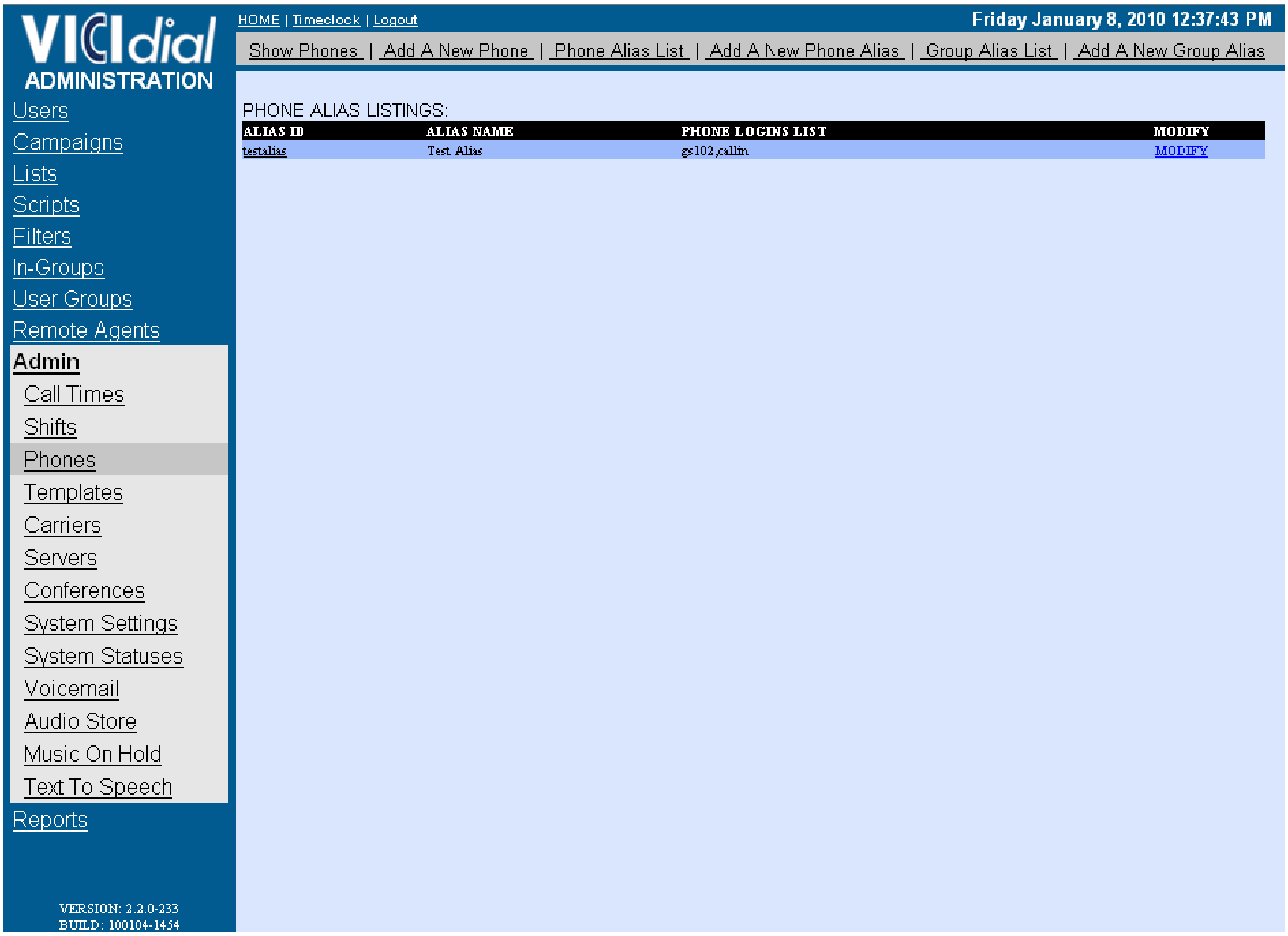


Figure 16. Phone Alias

ADMIN – PHONE ALIAS

On multi-server systems where you are using SIP or IAX phones that are able to register to multiple servers at the same time, you may want to use Phone Aliases that will allow you to balance the number of agents logged into each server across all servers as the agents log in. If a server fails and 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.

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.

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.

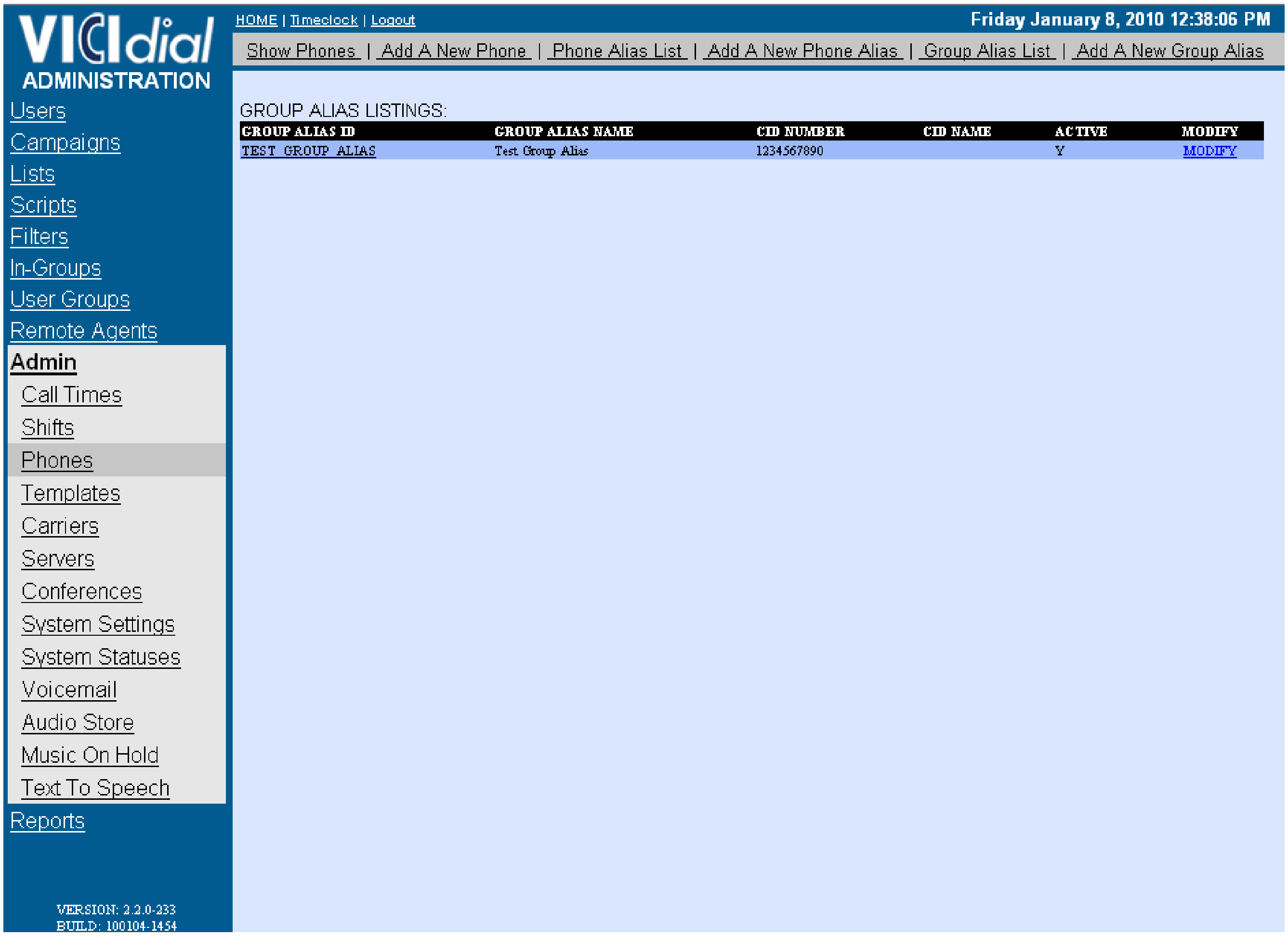


Figure 17. Group Alias

GROUP ALIAS

Group Aliases are an optional feature that allows agents to select an outbound callerID to send manual calls out as. 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 VICIDIAL 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.

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.

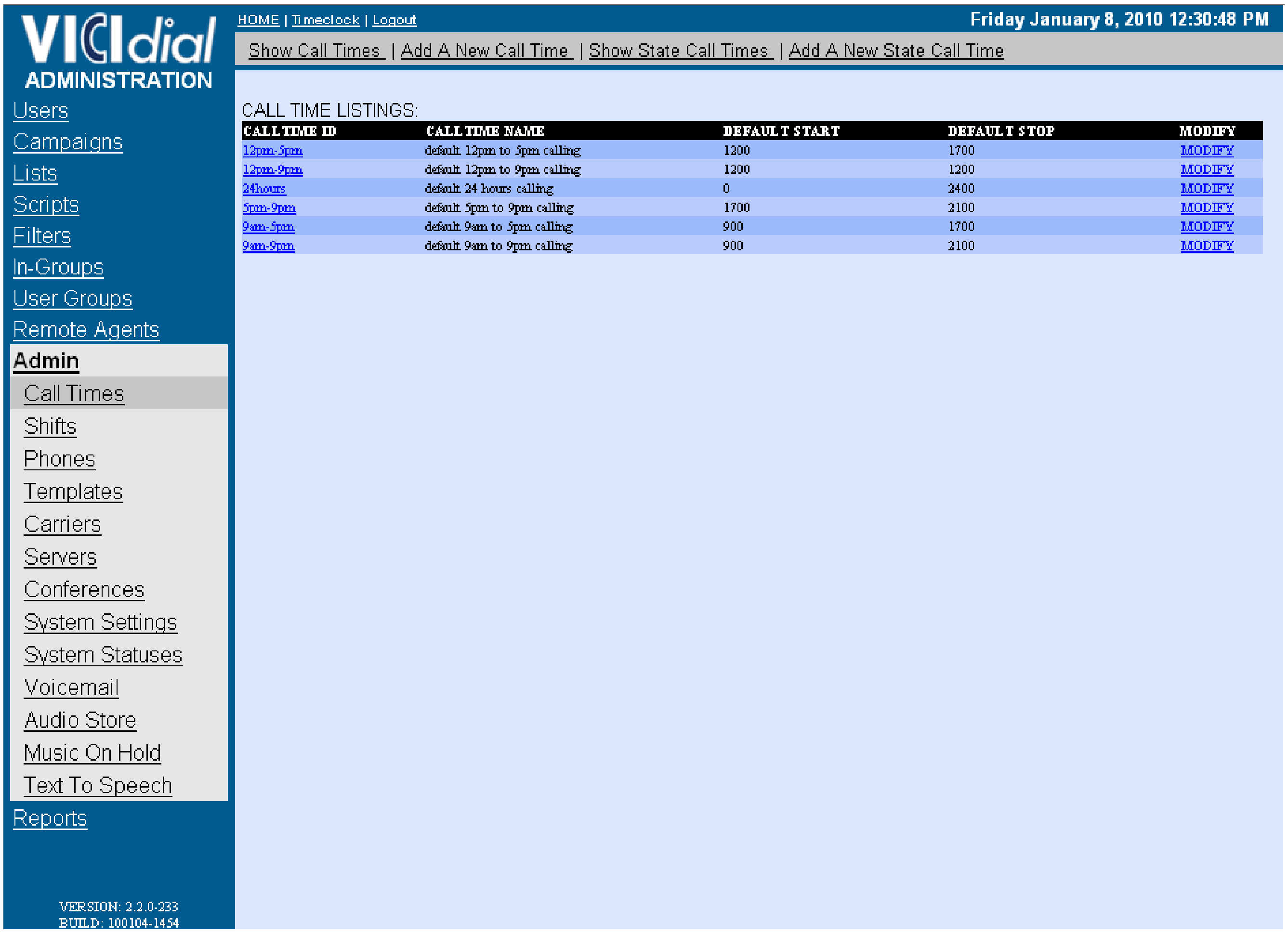


Figure 18. Vicidial Call Times List

ADMIN - VICIDIAL 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 hours and minutes. There is also a method for creating special rules to override these call time definitions by state(province). 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 sub-section. 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 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 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 Vicidial Call Time Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 10 characters, minimum of 2 characters.

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 Vicidial Call Time Definition such as "10am to 4pm with extra call state restrictions". max 255 characters.

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.

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.

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.

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.

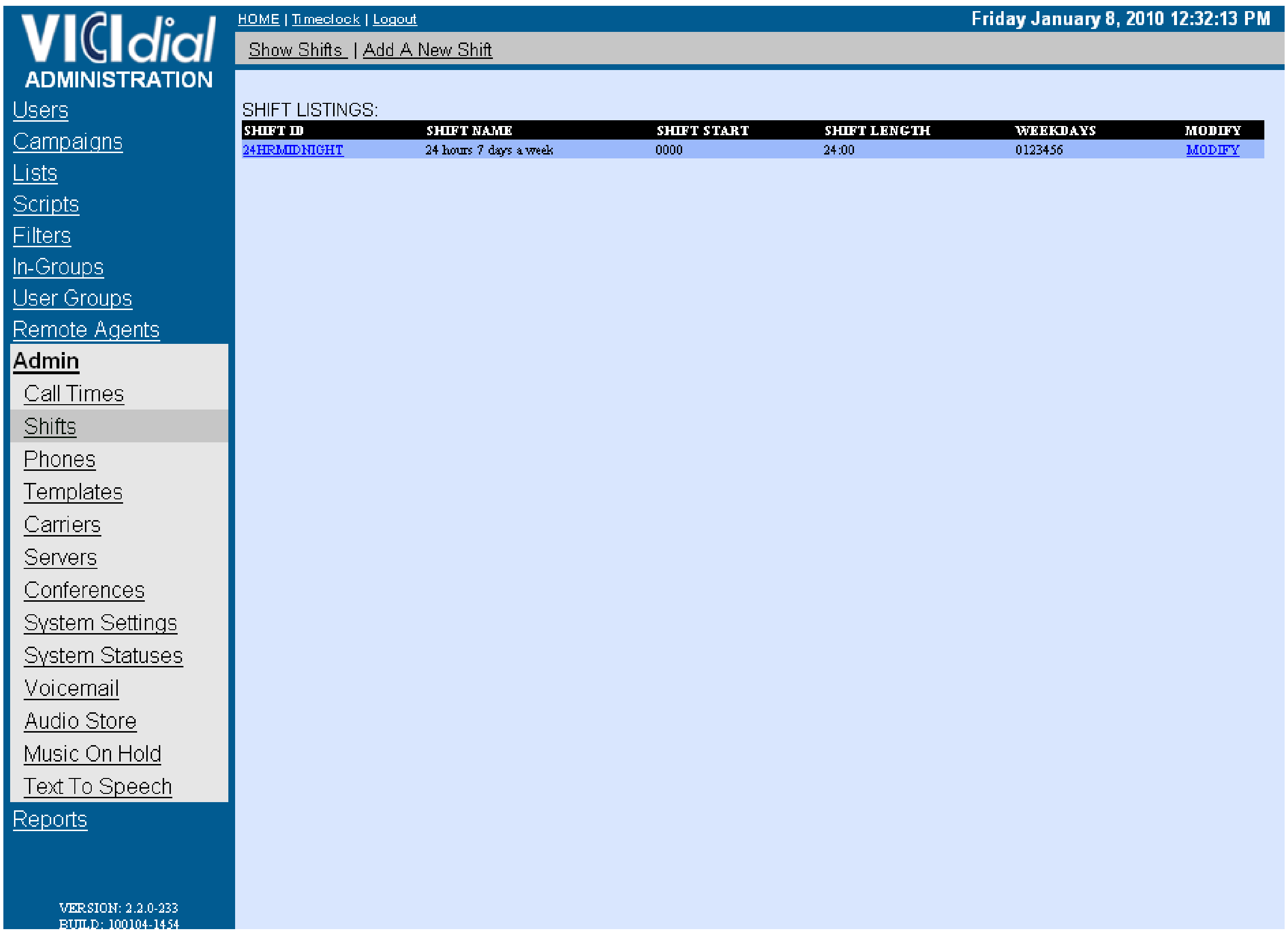


Figure 19. Vicidial Shifts

Shifts

Shifts are used in some reports within ViciDial and are also used to restrict User Groups to be able to log in to the ViciDial agent interface.

Here are the fields within the Shifts screen:

Shift ID - This is the short name of a Vicidial 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.

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 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.

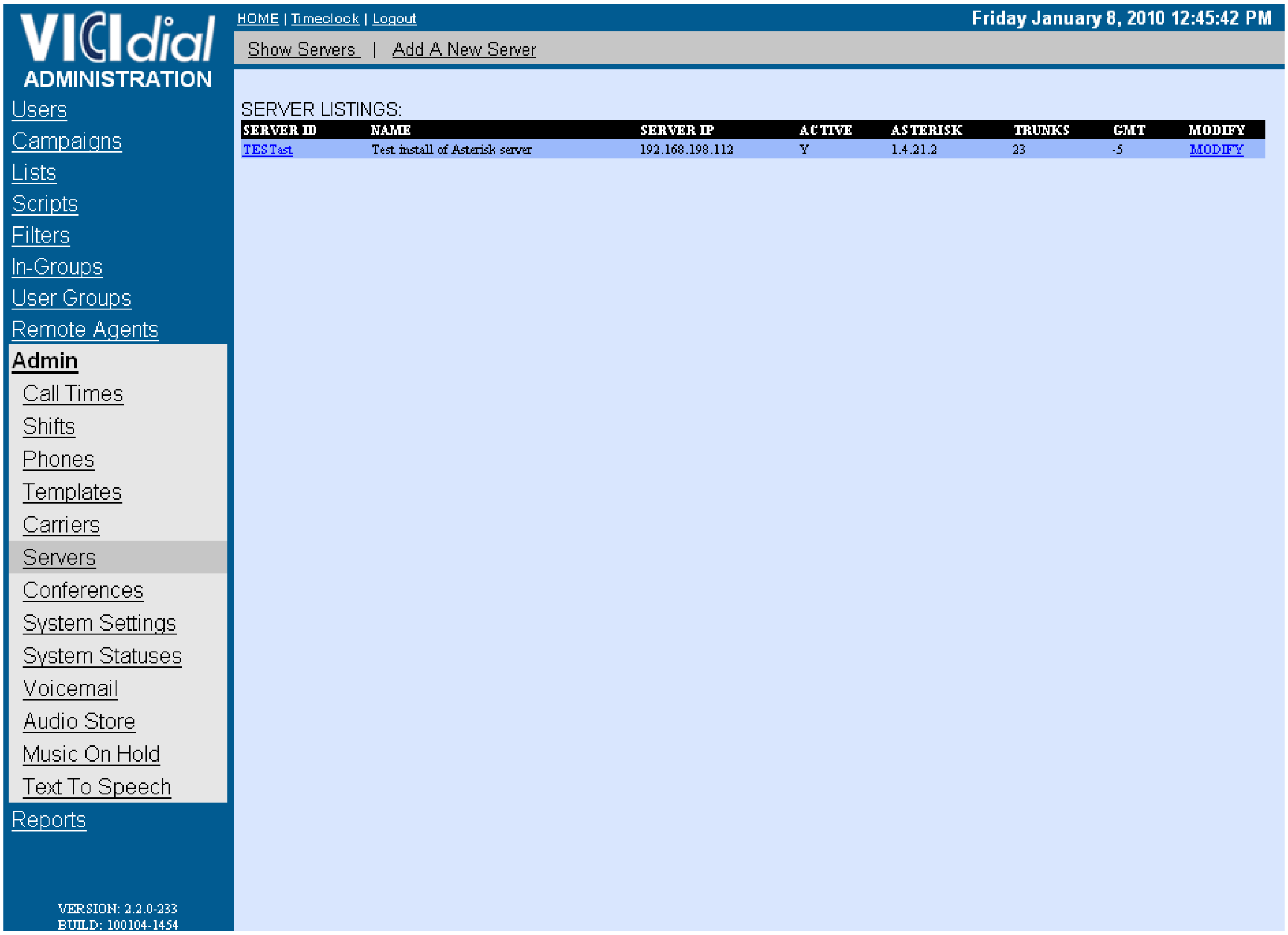


Figure 20. Admin - Servers List

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 at the top 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 it's record. At the bottom of the server modification page is a list of the phones, conferences and vicidial_conferences that are listed in the system as belonging to that server, each with a link to go to it's phone or conference modification page.

Server ID - This field is where you put the Asterisk servers name, doesn't have to be an official domain sub, just a nickname to identify the server to Admin users.

Server Description - The field where you use a small phrase to describe the Asterisk server.

Server IP Address - The field where you put the Network IP address of the Asterisk server.

Active - Set whether the Asterisk 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.

Disk Usage - This field will show the disk usage for every partition on this server. This field is updated once every minute.

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 and 1.0.9 have a different method of dealing with Local/ channels, a bug that has been fixed in CVS v1.0, and need to be treated differently when handling their Local/ channels. Also, current SVN_trunk and the 1.2 release tree uses different manager and command output so it must be treated differently as well.

Max ViciDial Trunks - This field will determine the maximum number of lines that the ViciDial auto-dialer will attempt to call on this server. If you want to dedicate two full PRI T1s to ViciDial 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 20.

ViciDial Balance Dialing - Setting this field to Y will allow the server to place balance calls for campaigns in ViciDial 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 ViciDial setups.

VICIDIAL 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.

ViciDial Balance Offlimits - This setting defines the number of trunks to not allow ViciDial balance dialing to use. For example if you have 40 max vicidial trunks and balance offlimits is set to 10 you will only be able to use 30 trunk lines for ViciDial balance dialing. Default is 0. This is only used in multi-server ViciDial 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-Savings-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'

ViciDial AD extension - The default extension if none is present in the campaign to send calls to for ViciDial auto dialing. Default is '8365'

Default Context - The default dialplan context used for scripts that operate for this server. Default is 'default'

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 ViciDial 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 ViciDial 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.

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.

Active Asterisk Server - If Asterisk is not running on this server, or if VICIDIAL 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.

Active Agent Server - Setting this option to N will prevent agents from being able to login to this server through the vicidial 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 VICIDIAL 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.

ViciDial Recording Limit - This field is where you set the maximum number of minutes that a call recording initiated by ViciDial can be. Default is 60 minutes.

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.

ViciDial Server Trunks

ViciDial 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 at the total lines used by vicidial on this server is less than the Max ViciDial 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 ViciDial 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 GMS 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.

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.

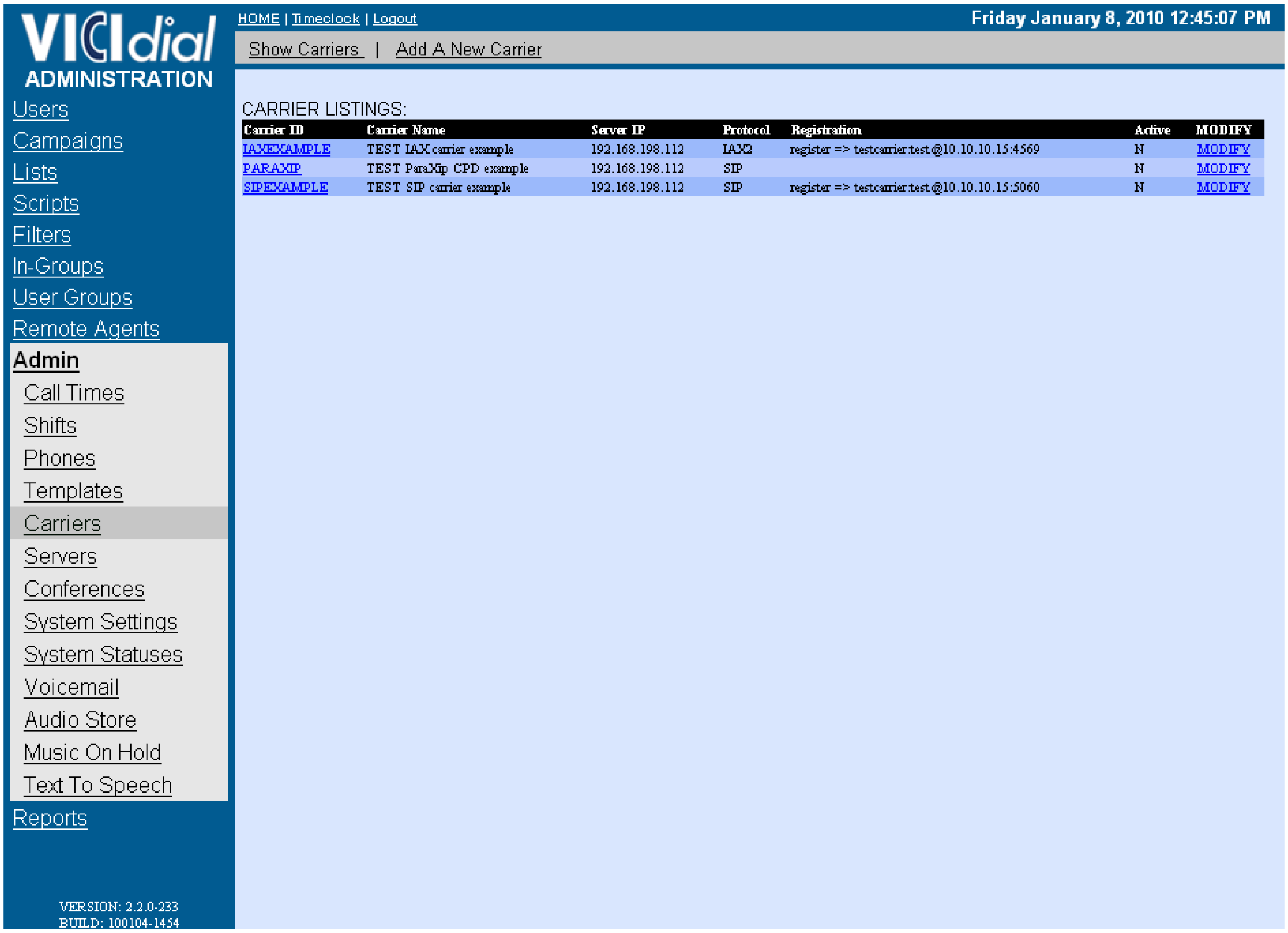


Figure 21. Server Carriers

Server Carriers(Trunks)

Server Carrier trunks are how your ViciDial server connects to the phone network or other Asterisk or VOIP 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.

Registration String - This field is where you can enter in the exact string needed in the IAX or SIP configuration file to register to the provider. Optional but highly recommended if your carrier allows registration.

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 VICIDIAL.

Protocol - This field allows you to define the protocol to use for the carrier entry. Currently only IAX and SIP are supported.

Globals 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.

Active - This defines whether the carrier will be included in the auto-generated conf files or not.

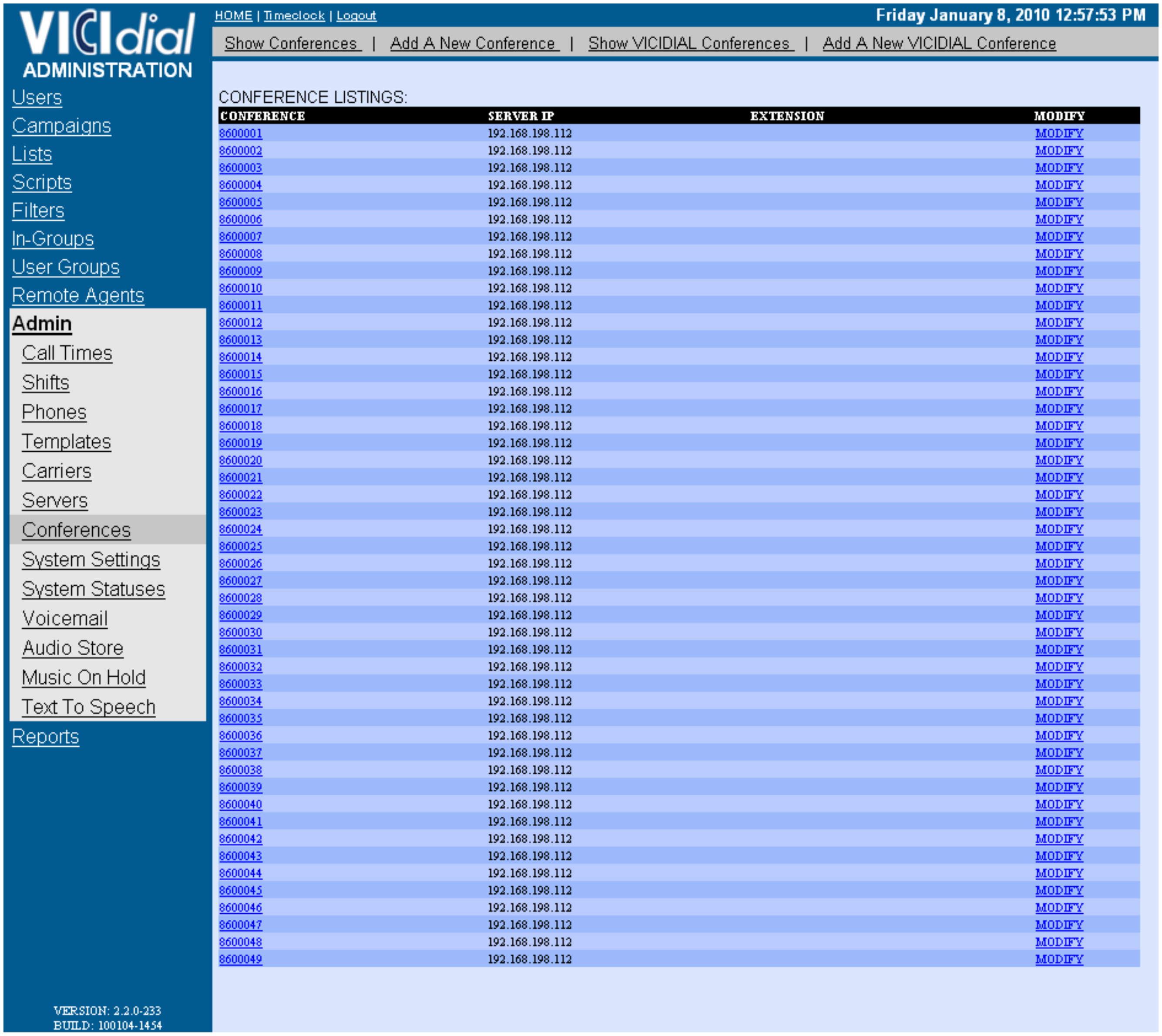


Figure 22. ADMIN - Conferences List

ADMIN - CONFERENCES and VICIDIAL CONFERENCES

Because the Conferences and ViciDial 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.

Add a New Conference

You can get to the Add Conference screen by clicking on the "ADD A NEW CONFERENCE" link at the top 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 ViciDial.

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).

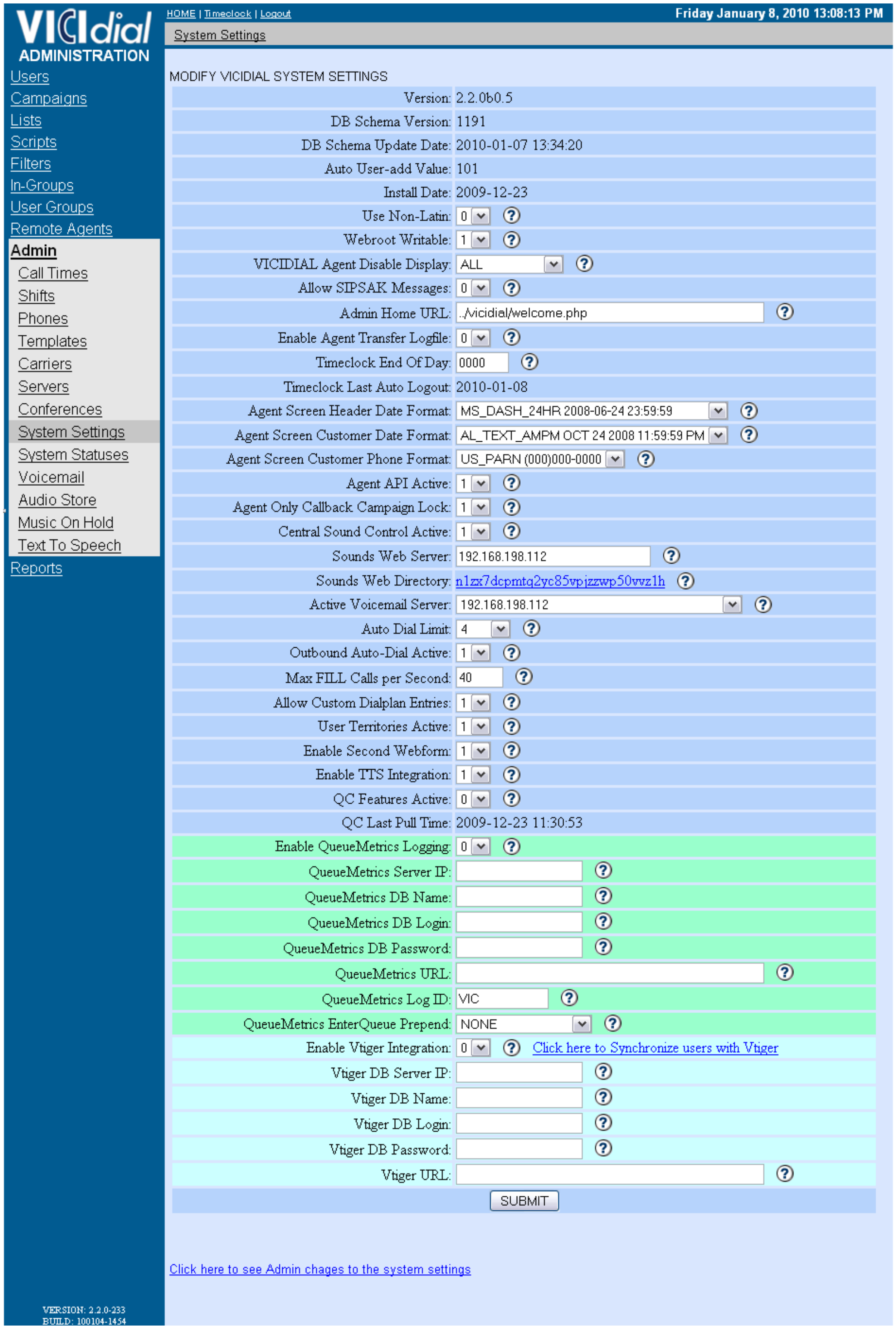


Figure 23. Vicidial System Settings

ADMIN - SYSTEM SETTINGS

This section contains global settings that effect every ViciDial server on a system as well as every agent and campaign.

DB Schema Version – The version of the database your ViciDial system is using.

Auto User-Add Value – The ViciDial user ID value that will be next if you use the AUTO-GENERATE option when creating the user

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.

Webroot Writable - This setting allows you to define whether temp files and authentication files should be placed in the webroot on your web server. Default is 1.

VICIDIAL 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 vicidial_auto_calls record has been removed, such as during a force logout or emergency logout. The Default is ALL.

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 ViciDial. This feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

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.

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.

Timeclock End Of Day - This setting defines when all users are to be auto logged out of the timeclock system. Only runs once a day. must be only 4 digits 2 digit hour and 2 digit minutes in 24 hour time. Default is 0000.

Timeclock Last Auto Logout - This field displays the date of the last auto-logout.

Agent Screen Header Date Format - This menu allows you to choose the format of the date that shows up at the top of the VICIDIAL 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 VICIDIAL 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 VICIDIAL 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 interface to function. Default is 0.

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.

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.

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.

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.

Outbound Auto-Dial Active - This option allows you to enable or disable outbound auto-dialing within VICIDIAL, 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.

Ratio Dial Limit - This is the maximum limit of the auto dial level in the campaign screen.

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.

Allow Custom Dialplan Entries - This option allows you to enter custom dialplan lines into Call Menus. Default is 0 for inactive.

User Territories Active - This setting allows you to enable the User Territories setttings 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 ViciDial system as well. Default is 0 for disabled.

Enable Second Webform - This setting allows you to have a second web form for campaigns and in-groups 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.

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.

Enable QueueMetrics Logging - This setting allows you to define whether ViciDial 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 ViciDial 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 vicidial_list data fields in front of the phone number of the customer for customized QueueMetrics reports. Default is NONE to not populate anything.

Enable Vtiger Integration - This setting allows you to enable Vtiger integration with VICIDIAL. 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.

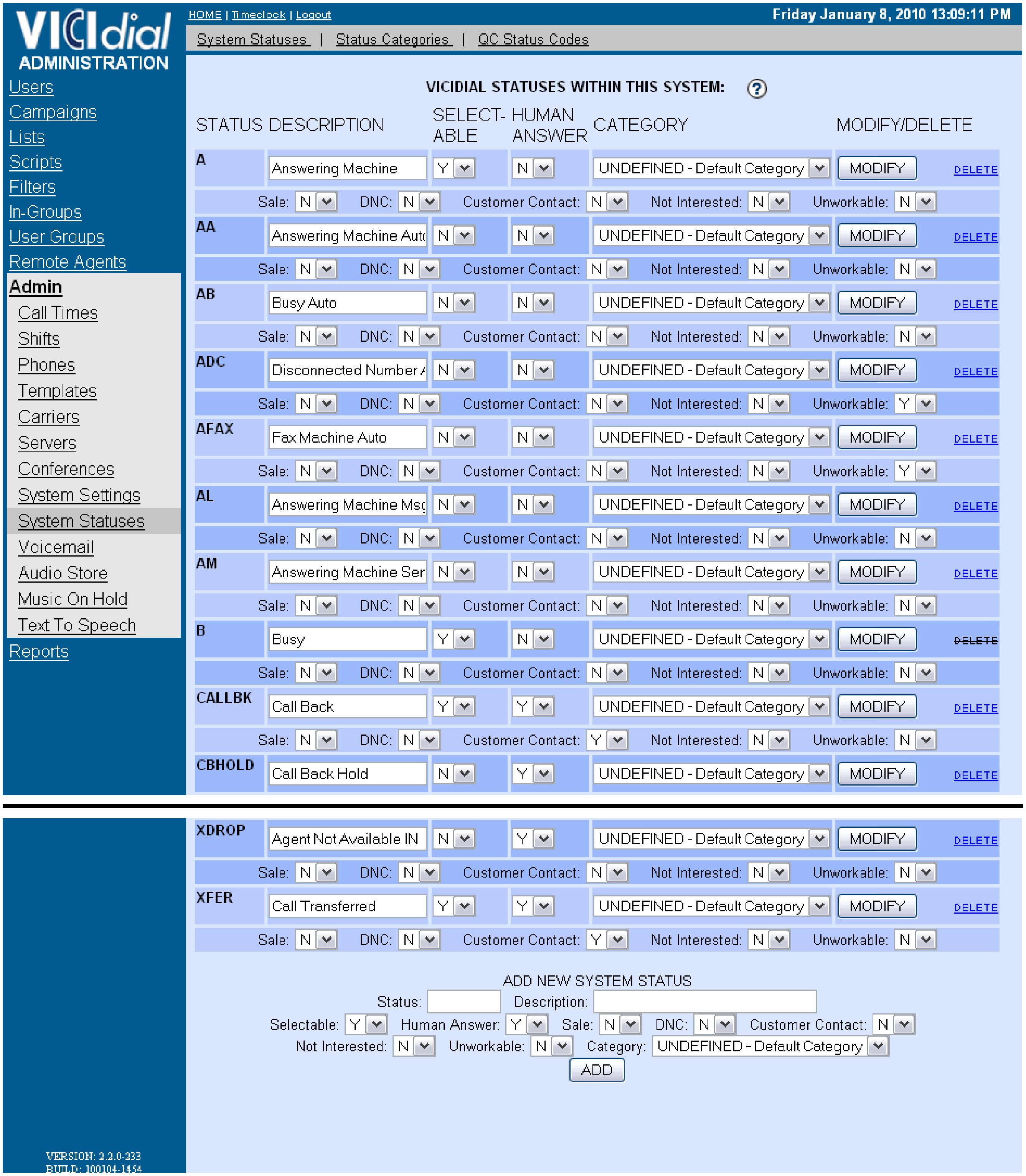


Figure 24. Vicidial System Statuses

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 and Selectable defines whether it shows up in the ViciDial 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. 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 ViciDial 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
AFAX - Fax Machine Auto - Dialer-defined Fax Machine
B - Busy - Carrier-received Busy signal, or agent-defined Busy if allowed
DC - Disconnected Number - Disconnected number
DEC - Declined Sale - Agent-defined status
DNC - DO NOT CALL - If defined, lead will also go in the VICIDIAL 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 VICIDIAL 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 VICIDIAL Campaign-specific DNC list for this Campaign
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
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

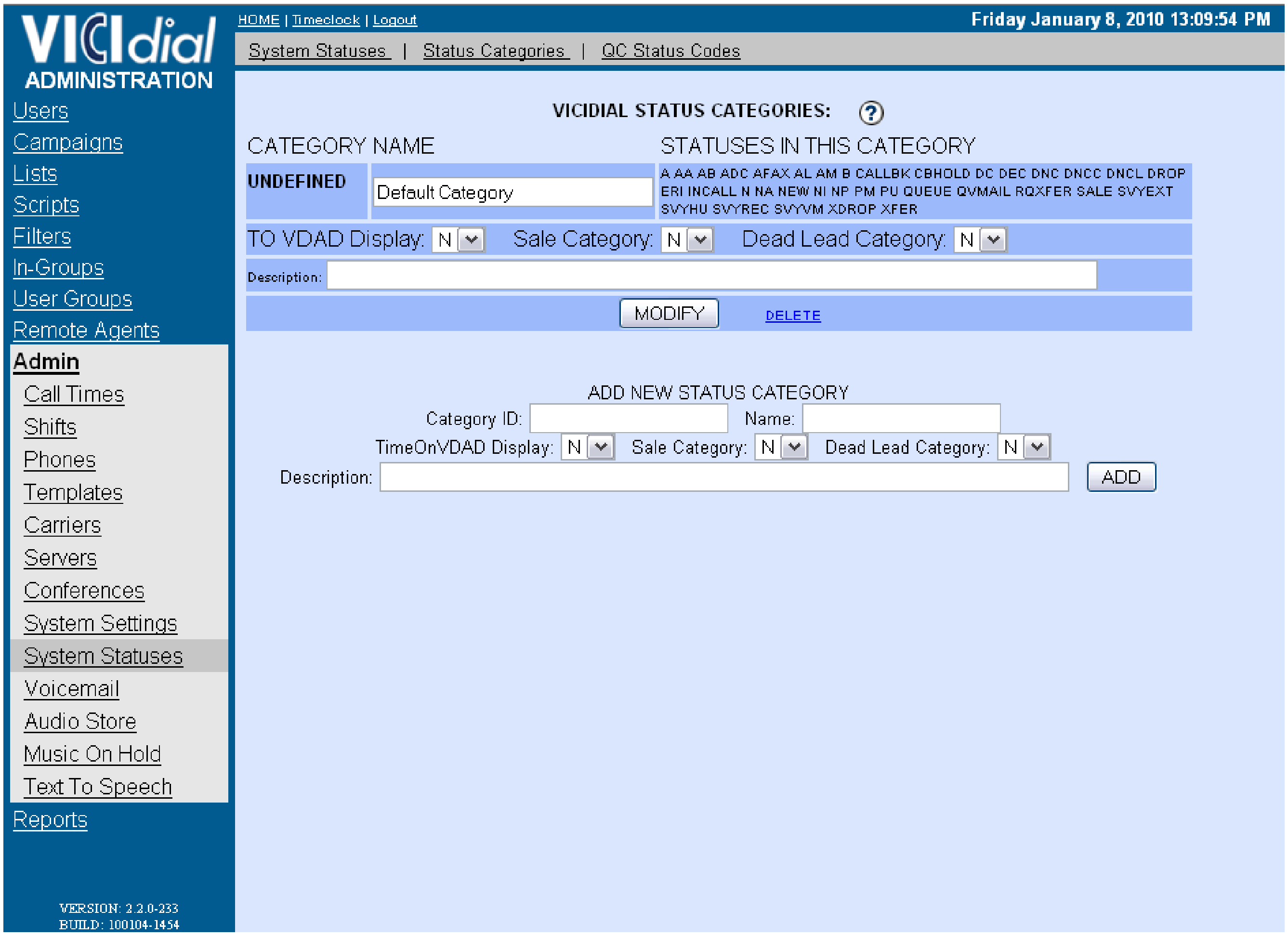


Figure 25. Vicidial System Status Categories

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 TimeonVDAD Display defines whether that status will be one of the up to 4 statuses that can be calculated and displayed on the Time On VDAD Real-Time report.

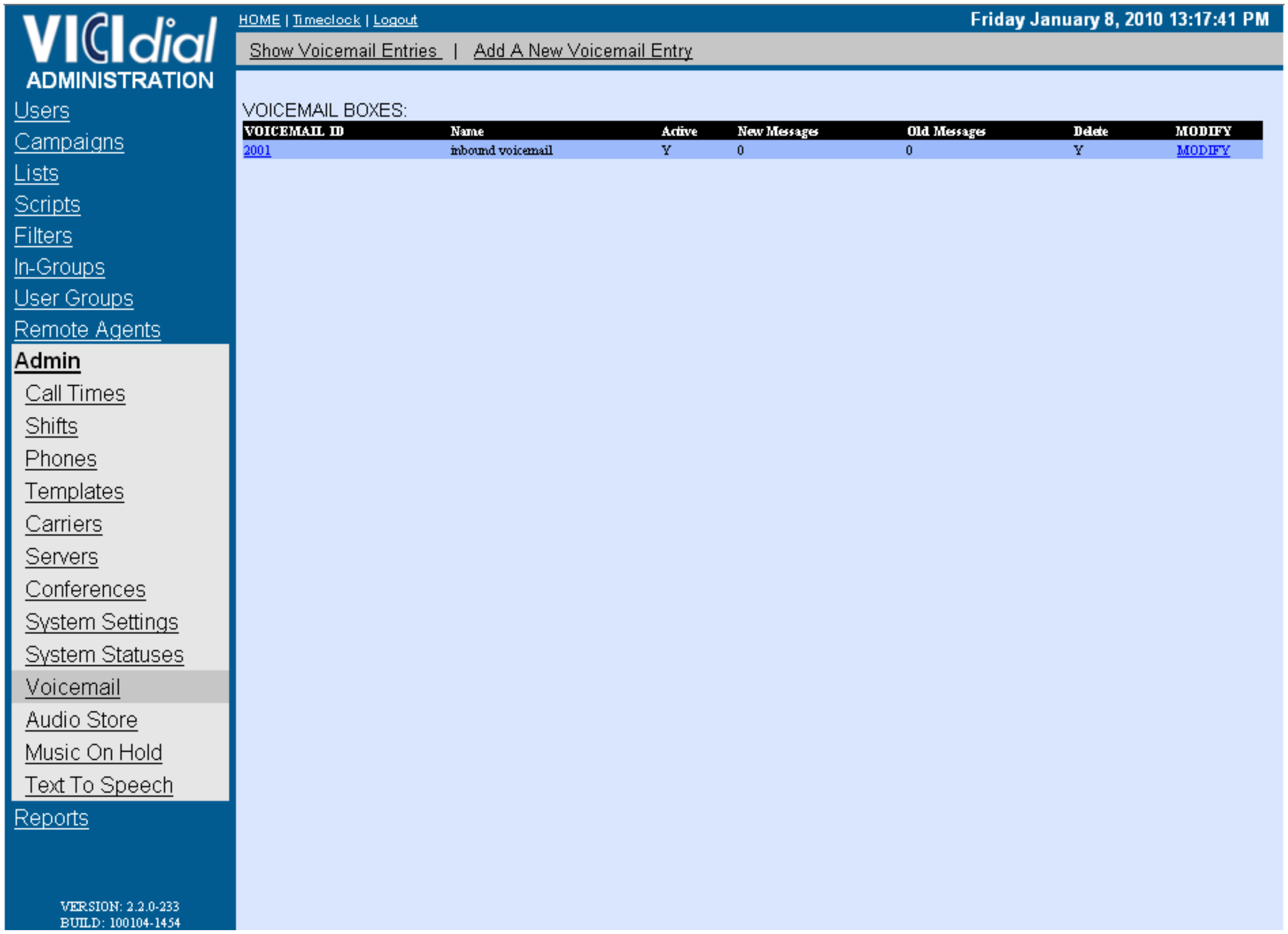


Figure 26. Admin - Voicemail List

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 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 additional voicemail boxes to be configured through since you may want to add a voicemail box to be used just for a message drop box from calls coming into one particular DID.

Add a New Voicemail Box

You can get to the Add Voicemail screen by clicking on the "ADD A NEW VOICEMAIL ENTRY" link at the top 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.

Name - This is name associated with this voicemail box. max 100 characters, 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.

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.

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.

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.

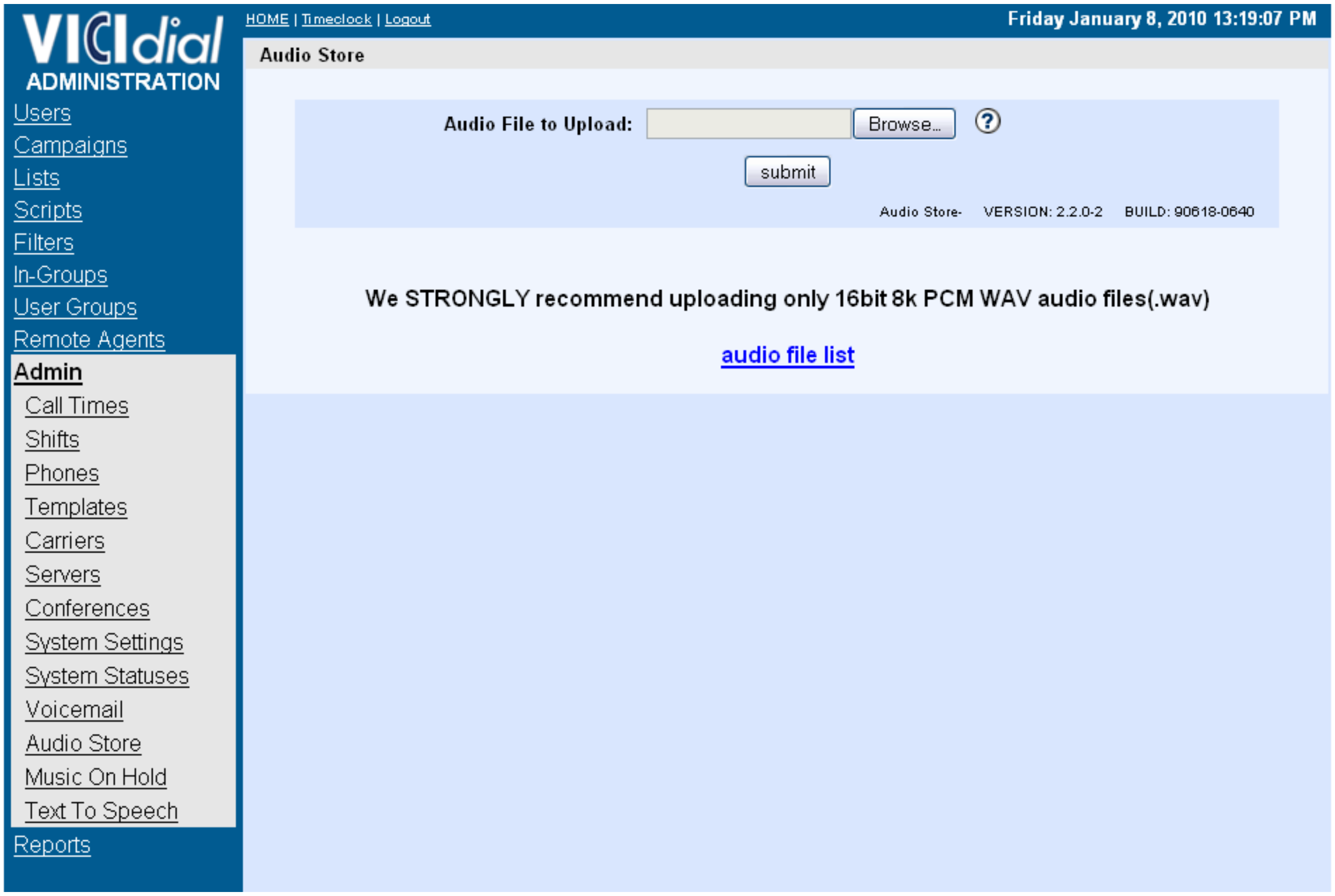


Figure 27. Admin – Audio Store

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 ViciDial servers in a multi-server cluster. An important note, only two audio file types will work, .wav files that are PCM 16bit 8k and .gsm files that are 8bit 8k. Please verify that your files are properly formatted before uploading them here.

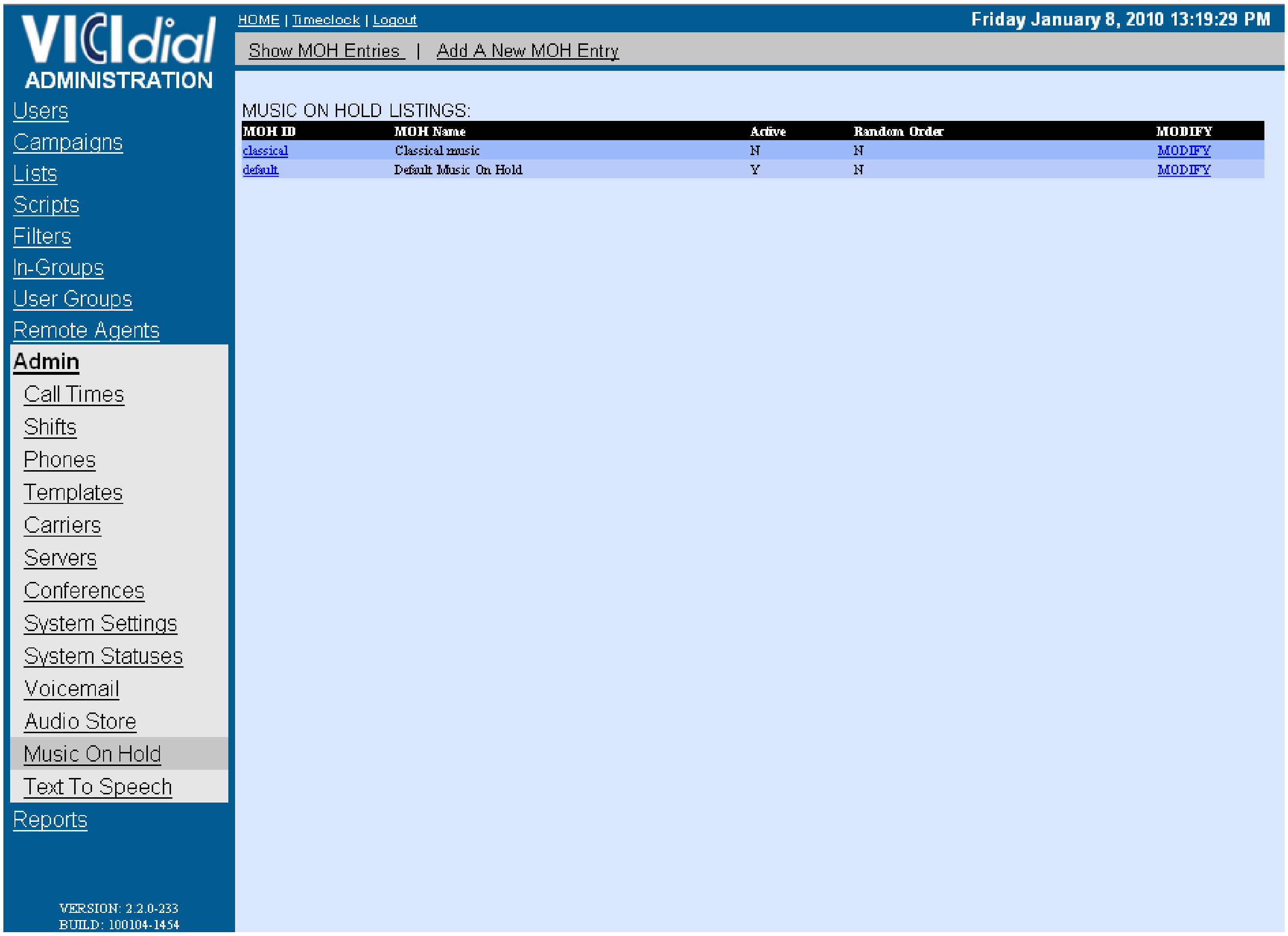


Figure 28. Admin – Music On Hold List

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 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 at the top 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-vicidial.conf file. max 255 characters, minimum of 2 characters.

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.

Filename - 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.

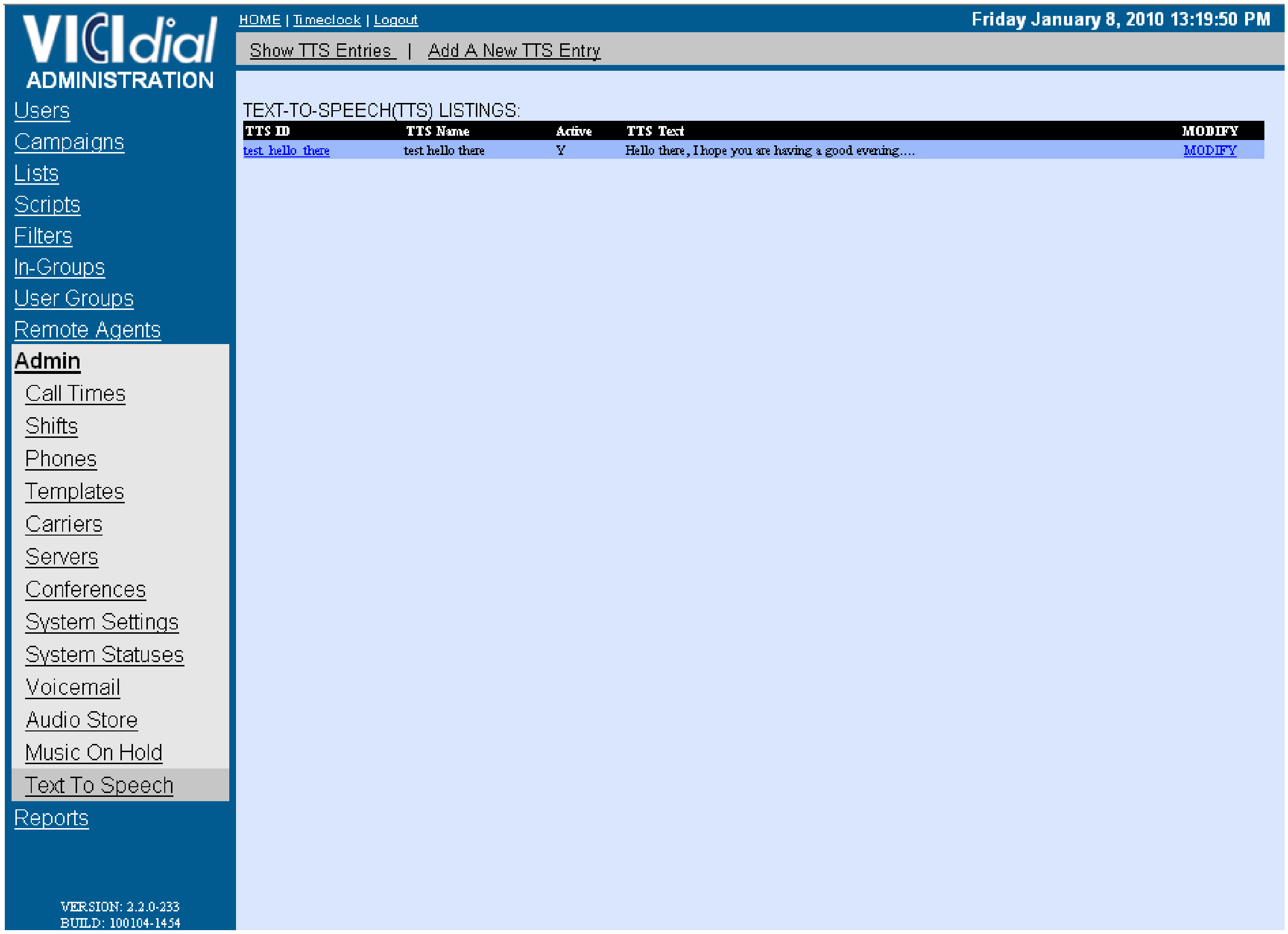


Figure 29. Admin – Text-to-Speech(TTS) List

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.

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 at the top 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.

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 ViciDial 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

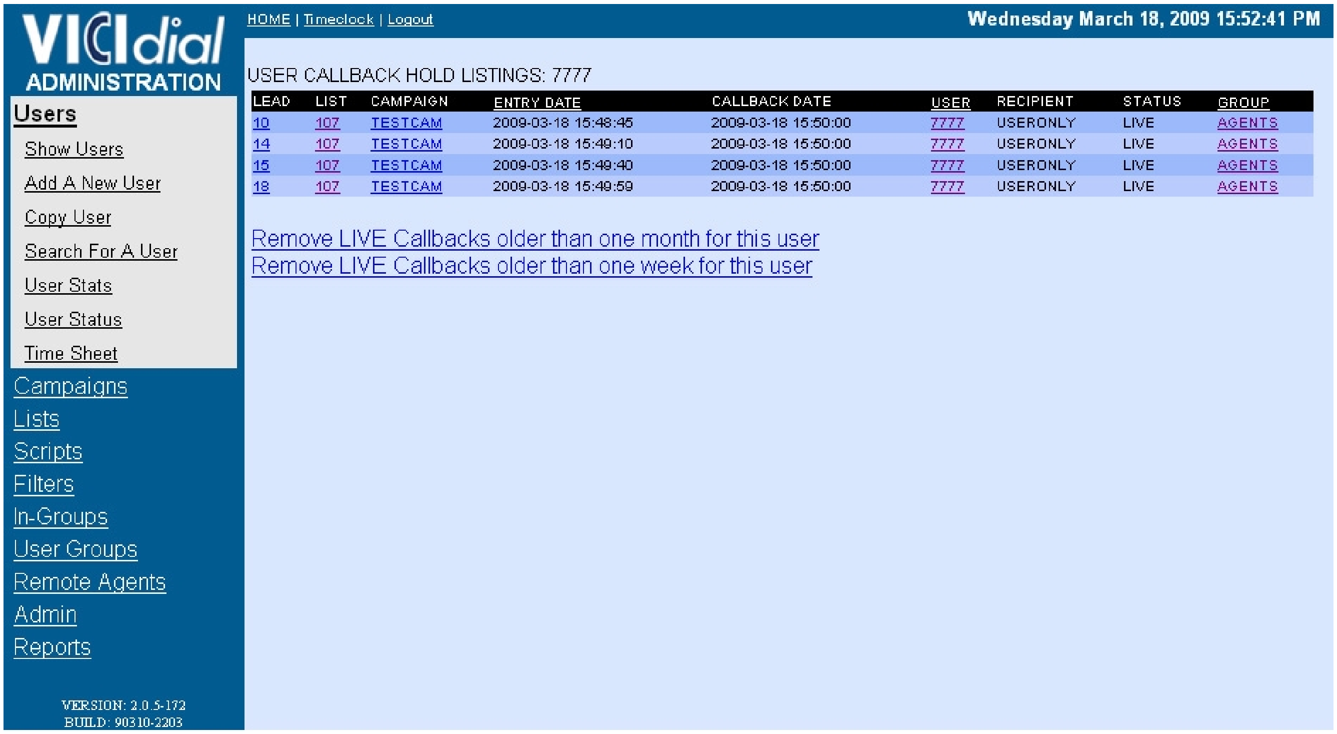


Figure 30. Vicidial Scheduled Callbacks

VICIDIAL 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 ViciDial 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 ViciDial 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.

ViciDial Timeclock

As of version 2.0.5 of ViciDial there is now a separate time clock application built in to ViciDial. This application can be used by an ViciDial user, and with ViciDial agents you can force them to log in on the Timeclock before they are allowed to log in to the ViciDial 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 ViciDial Agent Manual. There is a link to log in to the Time clock at the top of the ViciDial agent interface log in screen as well as at the top of the ViciDial 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 ViciDial 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 ViciDial 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.

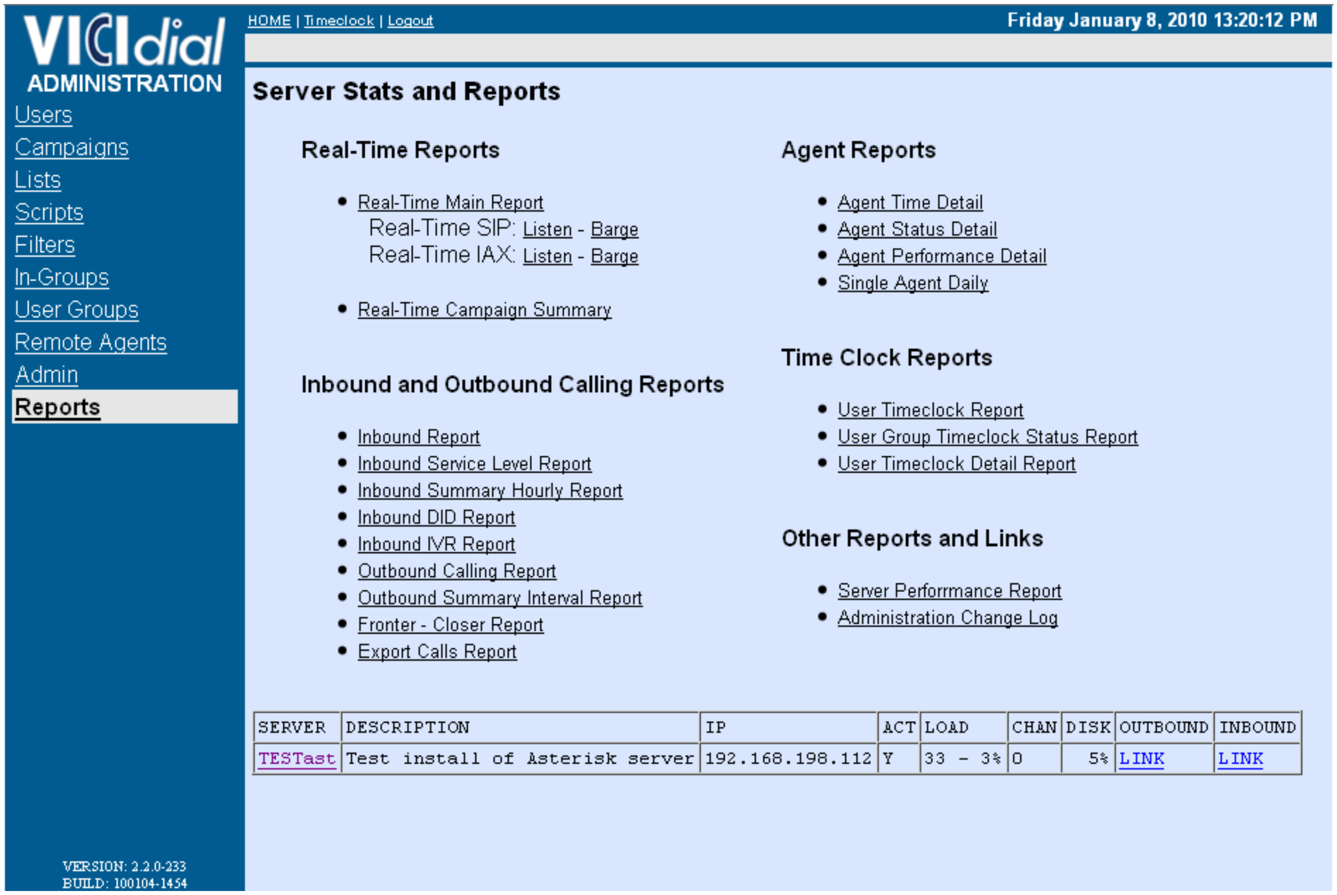


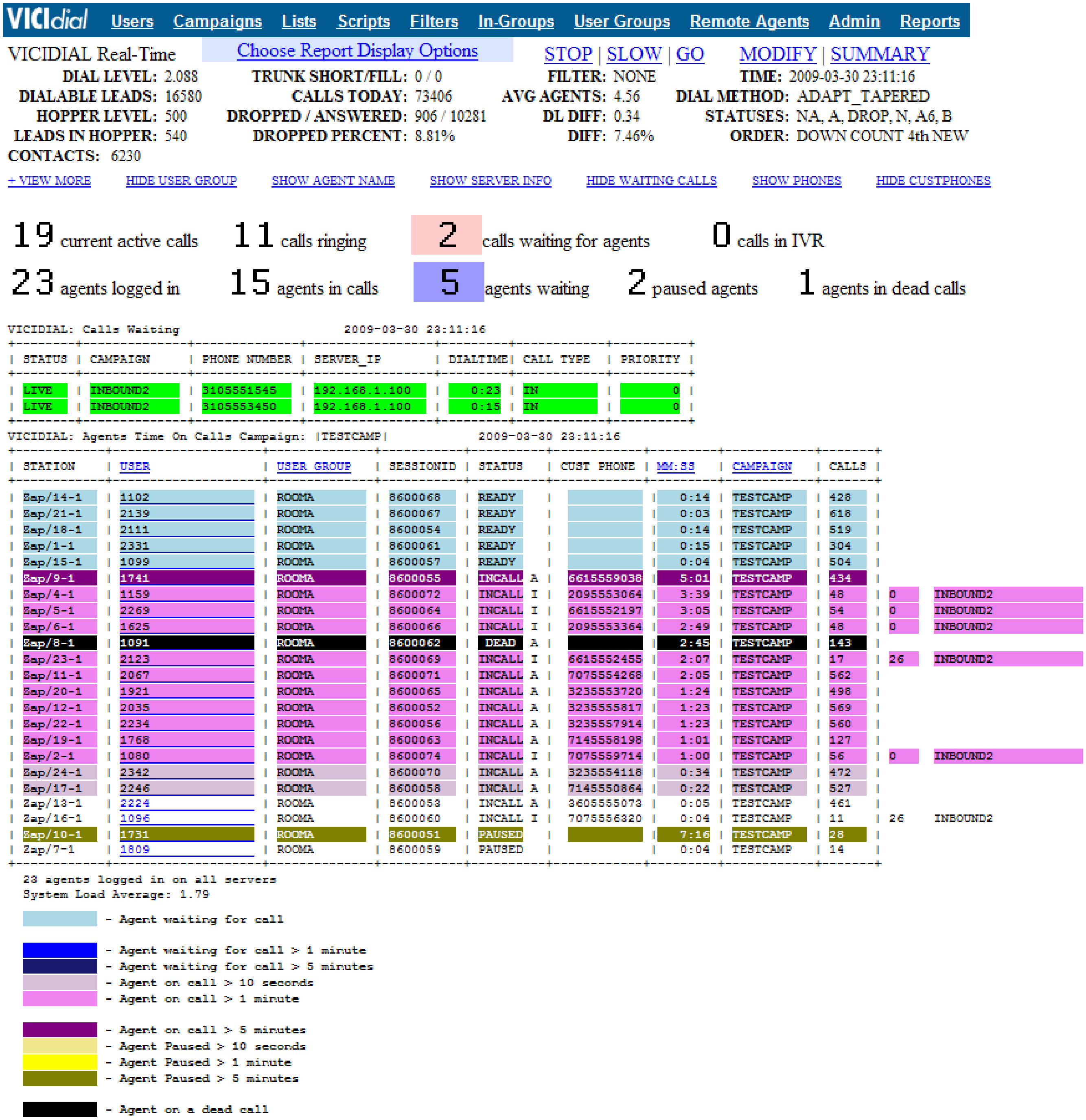
Figure 31. Vicidial Statistics and Reports

VICIDIAL STATS AND REPORTS

You can get to the Stats and Reports page by clicking on the REPORTS link at the far right of the top of the section bar at the top 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 ViciDial 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.



VICIdial | Users | Campaigns | Lists | Scripts | Filters | In-Groups | User Groups | Remote Agents | Admin | Reports

VICIDIAL Real-Time   Choose Report Display Options   STOP | SLOW | GO   MODIFY | SUMMARY

DIAL LEVEL: 2.088	TRUNK SHORT/FILL: 0 / 0	FILTER: NONE	TIME: 2009-03-30 23:11:16
DIALABLE LEADS: 16580	CALLS TODAY: 73406	AVG AGENTS: 4.56	DIAL METHOD: ADAPT_TAPERED
HOPPER LEVEL: 500	DROPPED / ANSWERED: 906 / 10281	DL DIFF: 0.34	STATUSES: NA, A, DROP, N, A6, B
LEADS IN HOPPER: 540	DROPPED PERCENT: 8.81%	DIFF: 7.46%	ORDER: DOWN COUNT 4th NEW
CONTACTS: 6230			

+ VIEW MORE | HIDE USER GROUP | SHOW AGENT NAME | SHOW SERVER INFO | HIDE WAITING CALLS | SHOW PHONES | HIDE CUSTPHONES

19 current active calls   11 calls ringing   2 calls waiting for agents   0 calls in IVR

23 agents logged in   15 agents in calls   5 agents waiting   2 paused agents   1 agents in dead calls

VICIDIAL: Calls Waiting   2009-03-30 23:11:16

STATUS	CAMPAIGN	PHONE NUMBER	SERVER_IP	DIALTIME	CALL TYPE	PRIORITY
LIVE	INBOUND2	3105551545	192.168.1.100	0:23	IN	0
LIVE	INBOUND2	3105553450	192.168.1.100	0:15	IN	0

VICIDIAL: Agents Time On Calls Campaign: |TESTCAMP| 2009-03-30 23:11:16

STATION	USER	USER GROUP	SESSIONID	STATUS		CUST PHONE	MM:SS	CAMPAIGN	CALLS		
Zap/14-1	1102	ROOMA	8600068	READY			0:14	TESTCAMP	428		
Zap/21-1	2139	ROOMA	8600067	READY			0:03	TESTCAMP	618		
Zap/18-1	2111	ROOMA	8600054	READY			0:14	TESTCAMP	519		
Zap/1-1	2331	ROOMA	8600061	READY			0:15	TESTCAMP	304		
Zap/15-1	1099	ROOMA	8600057	READY			0:04	TESTCAMP	504		
Zap/9-1	1741	ROOMA	8600055	INCALL	A	6615559038	5:01	TESTCAMP	434		
Zap/4-1	1159	ROOMA	8600072	INCALL	I	2095553064	3:39	TESTCAMP	48	0	INBOUND2
Zap/5-1	2269	ROOMA	8600064	INCALL	I	6615552197	3:05	TESTCAMP	54	0	INBOUND2
Zap/6-1	1625	ROOMA	8600066	INCALL	I	2095553364	2:49	TESTCAMP	48	0	INBOUND2
Zap/8-1	1091	ROOMA	8600062	DEAD	A		2:45	TESTCAMP	143		
Zap/23-1	2123	ROOMA	8600069	INCALL	I	6615552455	2:07	TESTCAMP	17	26	INBOUND2
Zap/11-1	2067	ROOMA	8600071	INCALL	A	7075554268	2:05	TESTCAMP	562		
Zap/20-1	1921	ROOMA	8600065	INCALL	A	3235553720	1:24	TESTCAMP	498		
Zap/12-1	2035	ROOMA	8600052	INCALL	A	3235555817	1:23	TESTCAMP	569		
Zap/22-1	2234	ROOMA	8600056	INCALL	A	3235557914	1:23	TESTCAMP	560		
Zap/19-1	1768	ROOMA	8600063	INCALL	A	7145558198	1:01	TESTCAMP	127		
Zap/2-1	1080	ROOMA	8600074	INCALL	I	7075559714	1:00	TESTCAMP	56	0	INBOUND2
Zap/24-1	2342	ROOMA	8600070	INCALL	A	3235554118	0:34	TESTCAMP	472		
Zap/17-1	2246	ROOMA	8600058	INCALL	A	7145550864	0:22	TESTCAMP	527		
Zap/13-1	2224	ROOMA	8600053	INCALL	A	3605555073	0:05	TESTCAMP	461		
Zap/16-1	1096	ROOMA	8600060	INCALL	I	7075556320	0:04	TESTCAMP	11	26	INBOUND2
Zap/10-1	1731	ROOMA	8600051	PAUSED			7:16	TESTCAMP	28		
Zap/7-1	1809	ROOMA	8600059	PAUSED			0:04	TESTCAMP	14		

23 agents logged in on all servers
System Load Average: 1.79

- Agent waiting for call
- Agent waiting for call > 1 minute
- Agent waiting for call > 5 minutes
- Agent on call > 10 seconds
- Agent on call > 1 minute
- Agent on call > 5 minutes
- Agent Paused > 10 seconds
- Agent Paused > 1 minute
- Agent Paused > 5 minutes
- Agent on a dead call

Figure 32. Time on VDAD Real-time per Campaign Report

TIME ON VDAD - Per Campaign

This is also known as the Real-time Campaign report, and is also linked to from the campaign modification pages. This report refreshes every 40 seconds by default(you can change the refresh rate by clicking on the GO[4 seconds], SLOW[40 seconds] and STOP[1 hour] links at the top) with the following information from the campaign 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. 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.

There is also an option at the top 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.

Another option is to see carrier hangup code statistics for calls that ended in the last several minutes and hours.

Clicking on the GO link at the top will start refreshing the page every 4 seconds. Clicking on the MODIFY link at the top will take you to the campaign modification page. Clicking on the SUMMARY link at the top will take you to the All Campaigns Summary screen.

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.

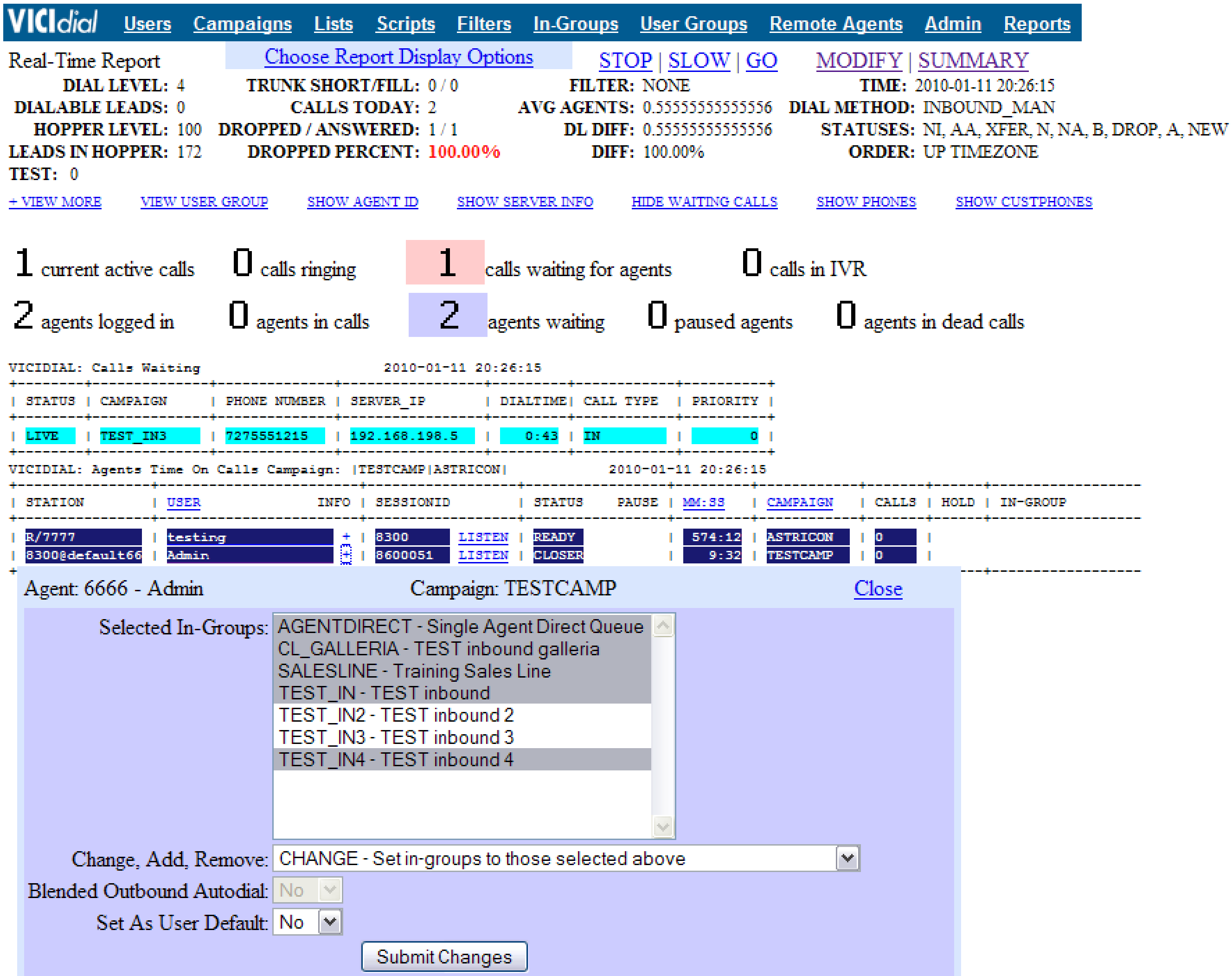


Figure 33. Changing In-Groups from the Real-time report

TIME ON VDAD – Change In-Groups

New in the 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.

Figure 34. Live Monitoring using a phone entry from the Real-time report

TIME ON VDAD – Live Audio Monitoring

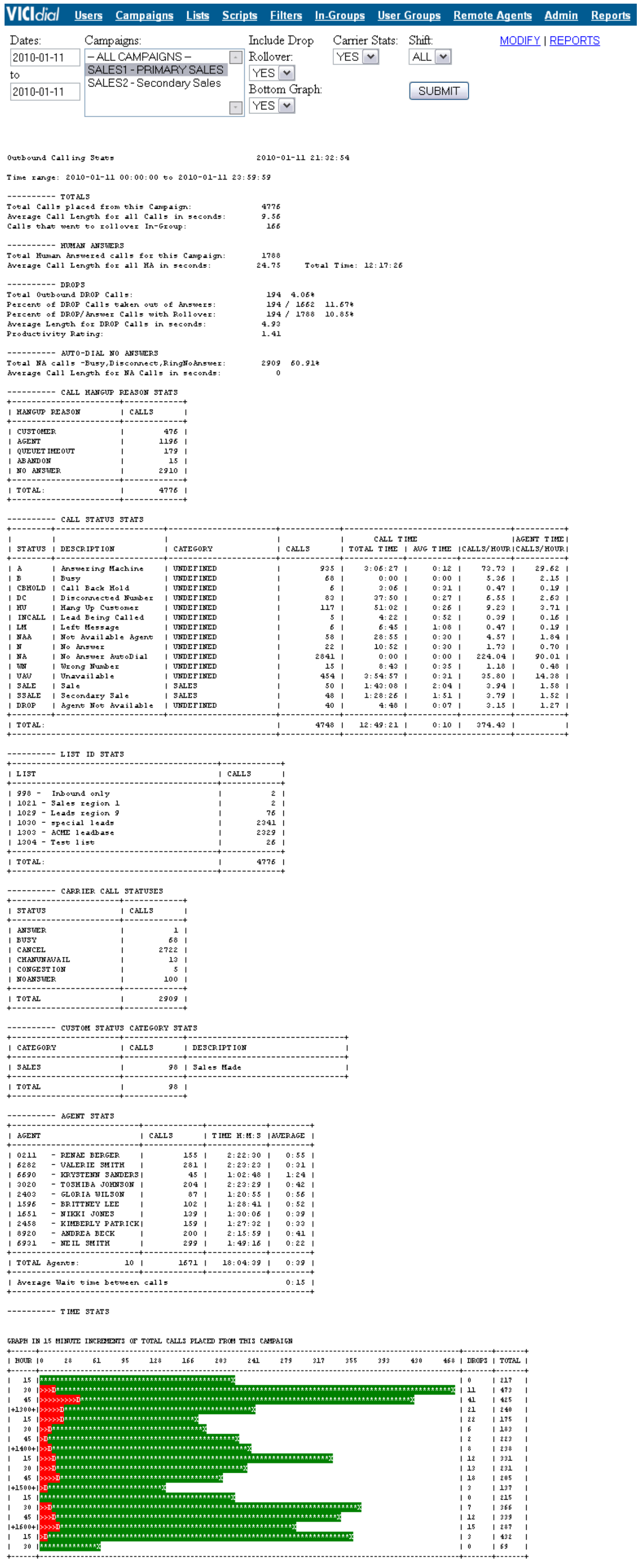
Also new in release 2.2.1 is the ability to enter a phone login that you want to monitor agents' sessions through so you can just click to LISTEN to the agent and it will ring your phone with a blind monitored session on the phone. The big difference between this functionality and the “SIP/IAX listen” links on the reports page is that you can use any phone entry to monitor from(Even EXTERNAL entries so you can monitor from any phone, even a mobile phone) and you do not have to have special soft-phone software installed on your system. See Tutorial P for an example of how to set this up and use it with a mobile cellphone.

TIME ON VDAD – 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.

TIME ON VDAD – SIP or IAX listen and barge

These links go to special versions of the Real-time time on VDAD campaign reports that have links allowing you to just click on an agent listing to either listen-in on them or Barge in and enter the conversation on a properly configured manager computer that has a SIP or IAX soft-phone. To use this you must have the proper soft-phone installed on your computer and you must have that soft-phone registered to each of the servers you will be monitoring agents on.



VICIdial Users Campaigns Lists Scripts Filters In-Groups User Groups Remote Agents Admin Reports

Dates: 2010-01-11 to 2010-01-11
Campaigns: -- ALL CAMPAIGNS -- / SALES1 - PRIMARY SALES / SALES2 - Secondary Sales
Include Drop Rollover: YES
Bottom Graph: YES
Carrier Stats: YES
Shift: ALL
SUBMIT
MODIFY | REPORTS

Outbound Calling Stats 2010-01-11 21:32:54

Time range: 2010-01-11 00:00:00 to 2010-01-11 23:59:59

---------- TOTALS
Total Calls placed from this Campaign: 4776
Average Call Length for all Calls in seconds: 9.56
Calls that went to rollover In-Group: 166

---------- HUMAN ANSWERS
Total Human Answered calls for this Campaign: 1788
Average Call Length for all HA in seconds: 24.75 Total Time: 12:17:26

---------- DROPS
Total Outbound DROP Calls: 194 4.06%
Percent of DROP Calls taken out of Answers: 194 / 1662 11.67%
Percent of DROP/Answer Calls with Rollover: 194 / 1788 10.85%
Average Length for DROP Calls in seconds: 4.93
Productivity Rating: 1.41

---------- AUTO-DIAL NO ANSWERS
Total NA calls -Busy,Disconnect,RingNoAnswer: 2909 60.91%
Average Call Length for NA Calls in seconds: 0

---------- CALL HANGUP REASON STATS

HANGUP REASON	CALLS
CUSTOMER	476
AGENT	1196
QUEUETIMEOUT	179
ABANDON	15
NO ANSWER	2910
TOTAL:	4776

---------- CALL STATUS STATS

STATUS	DESCRIPTION	CATEGORY	CALLS	CALL TIME TOTAL TIME	AVG TIME	CALLS/HOUR	AGENT TIME CALLS/HOUR
A	Answering Machine	UNDEFINED	935	3:06:27	0:12	73.73	29.62
B	Busy	UNDEFINED	68	0:00	0:00	5.36	2.15
CBHOLD	Call Back Hold	UNDEFINED	6	3:06	0:31	0.47	0.19
DC	Disconnected Number	UNDEFINED	83	37:50	0:27	6.55	2.63
HU	Hang Up Customer	UNDEFINED	117	51:02	0:26	9.23	3.71
INCALL	Lead Being Called	UNDEFINED	5	4:22	0:52	0.39	0.16
LM	Left Message	UNDEFINED	6	6:45	1:08	0.47	0.19
NAA	Not Available Agent	UNDEFINED	58	28:55	0:30	4.57	1.84
N	No Answer	UNDEFINED	22	10:52	0:30	1.73	0.70
NA	No Answer AutoDial	UNDEFINED	2841	0:00	0:00	224.04	90.01
WN	Wrong Number	UNDEFINED	15	8:43	0:35	1.18	0.48
UAV	Unavailable	UNDEFINED	454	3:54:57	0:31	35.80	14.38
SALE	Sale	SALES	50	1:43:08	2:04	3.94	1.58
SSALE	Secondary Sale	SALES	48	1:28:26	1:51	3.79	1.52
DROP	Agent Not Available	UNDEFINED	40	4:48	0:07	3.15	1.27
TOTAL:			4748	12:49:21	0:10	374.43	

---------- LIST ID STATS

LIST	CALLS
998 - Inbound only	2
1021 - Sales region 1	2
1029 - Leads region 9	76
1030 - special leads	2341
1303 - ACME leadbase	2329
1304 - Test list	26
TOTAL:	4776

---------- CARRIER CALL STATUSES

STATUS	CALLS
ANSWER	1
BUSY	68
CANCEL	2722
CHANUNAVAIL	13
CONGESTION	5
NOANSWER	100
TOTAL	2909

---------- CUSTOM STATUS CATEGORY STATS

CATEGORY	CALLS	DESCRIPTION
SALES	98	Sales Made
TOTAL	98	

---------- AGENT STATS

AGENT	CALLS	TIME H:M:S	AVERAGE
0211 - RENAE BERGER	155	2:22:30	0:55
6282 - VALERIE SMITH	281	2:23:23	0:31
6690 - KRYSTENN SANDERS	45	1:02:48	1:24
3020 - TOSHIBA JOHNSON	204	2:23:29	0:42
2403 - GLORIA WILSON	87	1:20:55	0:56
1596 - BRITTNEY LEE	102	1:28:41	0:52
1651 - NIKKI JONES	139	1:30:06	0:39
2458 - KIMBERLY PATRICK	159	1:27:32	0:33
8920 - ANDREA BECK	200	2:15:59	0:41
6931 - NEIL SMITH	299	1:49:16	0:22
TOTAL Agents: 10	1671	18:04:39	0:39
Average Wait time between calls			0:15

---------- TIME STATS

GRAPH IN 15 MINUTE INCREMENTS OF TOTAL CALLS PLACED FROM THIS CAMPAIGN

HOUR	0 28 61 95 128 166 203 241 279 317 355 393 430 468	DROPS	TOTAL
15		0	217
30		11	473
45		41	425
+1300+		21	240
15		22	175
30		6	183
45		2	223
+1400+		8	238
15		12	331
30		13	231
45		18	205
+1500+		3	137
15		0	215
30		7	366
45		12	339
+1600+		15	287
15		3	432
30		0	69

Run Time: 29 seconds

Figure 35. VDAD Outbound Report

VDAD OUTBOUND REPORT

The VDAD(ViciDial 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 QUEUETIMEOUT.

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.

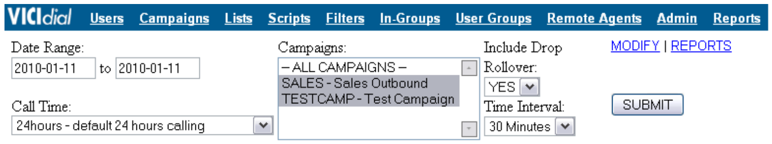
The sixth section shows the lists that were called and how many calls were placed from each list.

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.




```
Outbound Summary Interval Report: |LATEDDS|Flex|        2010-01-12 05:54:37

---------- MULTI-CAMPAIGN BREAKDOWN:
+----------------------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
|                                        |        | SYSTEM | AGENT  |        |        | NO     |        | AGENT      | AGENT      |
|                                        | TOTAL  | RELEASE| RELEASE| SALE   | DNC    | ANSWER | DROP   | LOGIN      | PAUSE      |
| CAMPAIGN                               | CALLS  | CALLS  | CALLS  | CALLS  | CALLS  | PERCENT| PERCENT| TIME(H:M:S)| TIME(H:M:S)|
+----------------------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
| SALES - Sales Outbound                 |   3522 |   2141 |   1381 |      0 |      0 |  58.32%|   2.39%|   25:02:50 |    4:01:10 |
| TESTCAMP - Test Campaign               |   1761 |   1116 |    645 |      0 |      0 |  61.84%|   1.42%|   15:19:27 |    2:26:26 |
+----------------------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
| TOTALS       Campaigns:    2           |   5283 |   3257 |   2026 |      0 |      0 |  59.49%|   2.06%|   40:22:17 |    6:27:36 |
+----------------------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+

---------- SALES - Sales Outbound     INTERVAL BREAKDOWN:
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
|                         |        | SYSTEM | AGENT  |        |        | NO     |        | AGENT      | AGENT      |
|                         | TOTAL  | RELEASE| RELEASE| SALE   | DNC    | ANSWER | DROP   | LOGIN      | PAUSE      |
| INTERVAL                | CALLS  | CALLS  | CALLS  | CALLS  | CALLS  | PERCENT| PERCENT| TIME(H:M:S)| TIME(H:M:S)|
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
|                     000 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     030 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     100 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     130 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     200 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     300 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     400 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     430 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     500 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     530 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     600 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     630 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     700 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     730 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     800 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     830 |    347 |    232 |    115 |      0 |      0 |  64.55%|   2.31%|    2:07:06 |       0:26 |
|                     900 |    460 |    274 |    186 |      0 |      0 |  55.87%|   3.70%|    2:55:04 |      18:07 |
|                     930 |    494 |    298 |    196 |      0 |      0 |  58.10%|   2.23%|    2:59:37 |       1:19 |
|                    1000 |    547 |    319 |    228 |      0 |      0 |  56.67%|   1.65%|    3:01:07 |       3:46 |
|                    1030 |    305 |    173 |    132 |      0 |      0 |  55.08%|   1.64%|    3:04:00 |      53:06 |
|                    1100 |    552 |    353 |    199 |      0 |      0 |  61.23%|   2.36%|    3:12:52 |       2:03 |
|                    1130 |    553 |    325 |    228 |      0 |      0 |  55.88%|   2.71%|    3:31:46 |       1:00 |
|                    1200 |    262 |    166 |     96 |      0 |      0 |  61.07%|   2.29%|    4:11:18 |    2:41:23 |
|                    1230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1300 |      2 |      1 |      1 |      0 |      0 |  50.00%|   0.00%|       0:00 |       0:00 |
|                    1330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1400 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1430 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1500 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1530 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1600 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1630 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1700 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1730 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1800 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1830 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1900 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1930 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2000 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2030 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2100 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2130 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2200 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2300 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
| TOTALS                  |   3522 |   2141 |   1381 |      0 |      0 |  58.32%|   2.39%|   25:02:50 |    4:01:10 |
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+

---------- TESTCAMP - Test Campaign     INTERVAL BREAKDOWN:
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
|                         |        | SYSTEM | AGENT  |        |        | NO     |        | AGENT      | AGENT      |
|                         | TOTAL  | RELEASE| RELEASE| SALE   | DNC    | ANSWER | DROP   | LOGIN      | PAUSE      |
| INTERVAL                | CALLS  | CALLS  | CALLS  | CALLS  | CALLS  | PERCENT| PERCENT| TIME(H:M:S)| TIME(H:M:S)|
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
|                     000 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     030 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     100 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     130 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     200 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     300 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     400 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     430 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     500 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     530 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     600 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     630 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     700 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     730 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     800 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     830 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     900 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                     930 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1000 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1030 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1100 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1130 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1200 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1300 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1400 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1430 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1500 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1530 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1600 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    1630 |    311 |    181 |    130 |      0 |      0 |  55.95%|   2.25%|    2:33:16 |      22:25 |
|                    1700 |    296 |    167 |    129 |      0 |      0 |  54.73%|   1.35%|    2:07:24 |      19:22 |
|                    1730 |    220 |    135 |     85 |      0 |      0 |  59.55%|   1.82%|    1:57:09 |       5:26 |
|                    1800 |    195 |    114 |     81 |      0 |      0 |  57.44%|   1.03%|    1:28:22 |       0:00 |
|                    1830 |     98 |     61 |     37 |      0 |      0 |  59.18%|   3.06%|    1:51:49 |      42:17 |
|                    1900 |    158 |    111 |     47 |      0 |      0 |  69.62%|   0.63%|    1:34:07 |      13:21 |
|                    1930 |    192 |    139 |     53 |      0 |      0 |  72.40%|   0.00%|    1:29:31 |      12:35 |
|                    2000 |    259 |    187 |     72 |      0 |      0 |  70.66%|   1.16%|    1:33:22 |       5:18 |
|                    2030 |     32 |     21 |     11 |      0 |      0 |  62.50%|   3.12%|      44:27 |      25:42 |
|                    2100 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2130 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2200 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2230 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2300 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
|                    2330 |      0 |      0 |      0 |      0 |      0 |   0.00%|   0.00%|       0:00 |       0:00 |
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+
| TOTALS                  |   1761 |   1116 |    645 |      0 |      0 |  61.84%|   1.42%|   15:19:27 |    2:26:26 |
+-------------------------+--------+--------+--------+--------+--------+--------+--------+------------+------------+

Run Time: 4 seconds
```

Figure 37. ViciDial Outbound Interval Report

VICIDIAL OUTBOUND INTERVAL REPORT

The ViciDial 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.

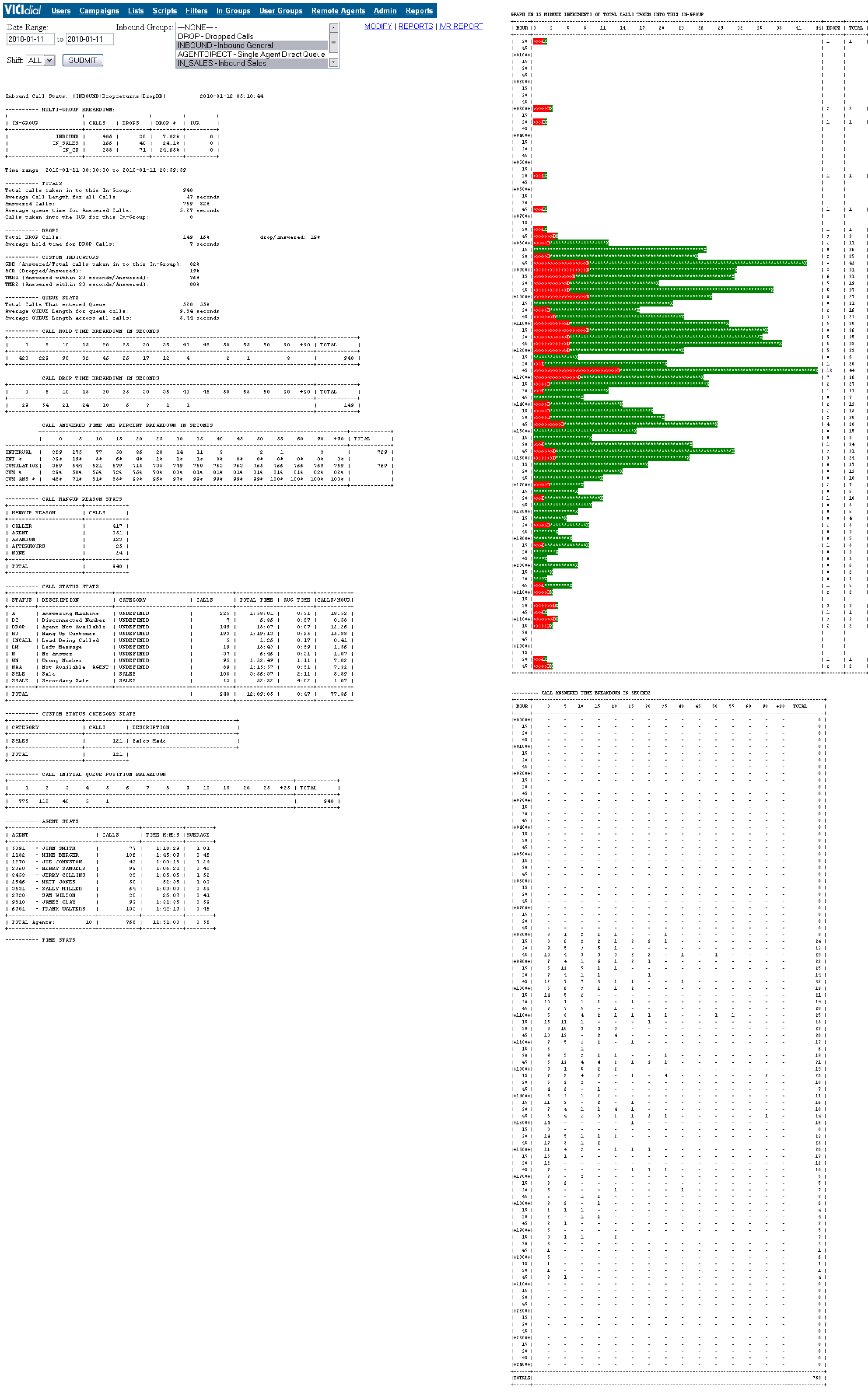


Figure 36. Inbound Report

VDAD CLOSER/INBOUND REPORT

The VDAD Closer Report has many of the same parts as the standard VDAD Outbound 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 VDAD Closer 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.

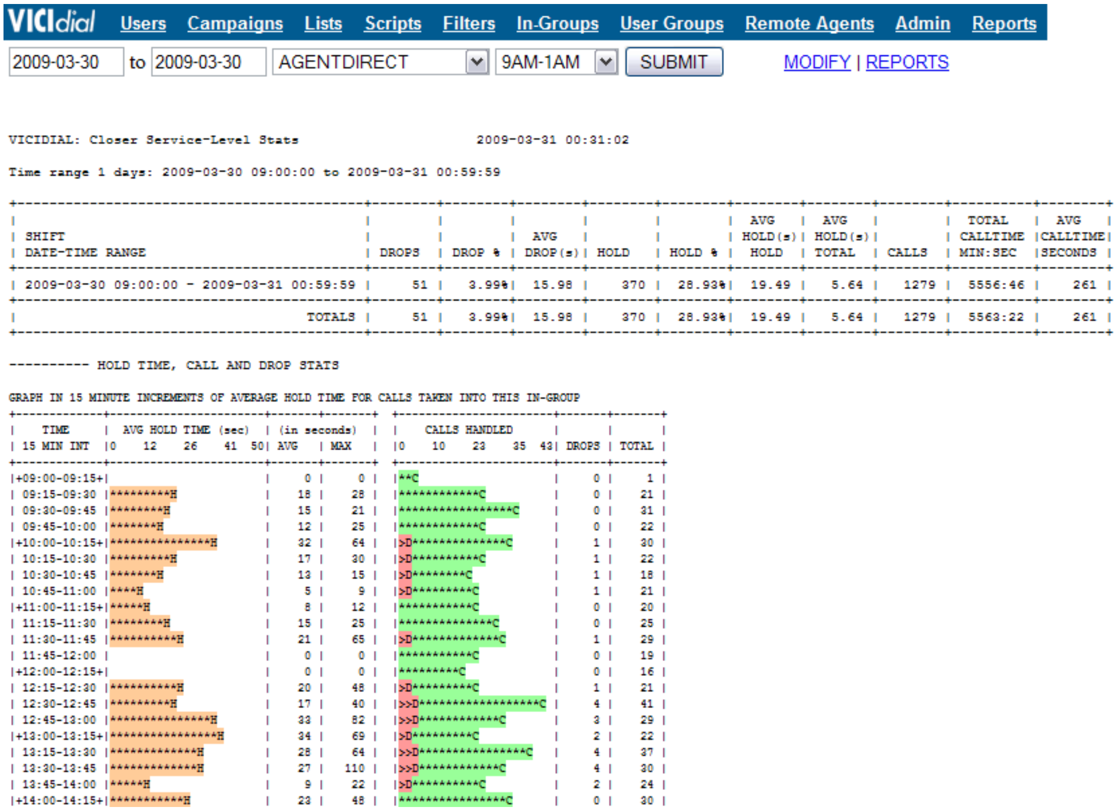
Next are custom indicators, which will show you different percentages for different inbound metrics like Answered calls out of total calls.

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.



VICIdial | Users | Campaigns | Lists | Scripts | Filters | In-Groups | User Groups | Remote Agents | Admin | Reports

2009-03-30 to 2009-03-30 | AGENTDIRECT | 9AM-1AM | SUBMIT | MODIFY | REPORTS

VICIDIAL: Closer Service-Level Stats 2009-03-31 00:31:02

Time range 1 days: 2009-03-30 09:00:00 to 2009-03-31 00:59:59

SHIFT DATE-TIME RANGE	DROPS	DROP %	AVG DROP(s)	HOLD	HOLD %	AVG HOLD(s) HOLD	AVG HOLD(s) TOTAL	CALLS	TOTAL CALLTIME MIN:SEC	AVG CALLTIME SECONDS
2009-03-30 09:00:00 - 2009-03-31 00:59:59	51	3.99%	15.98	370	28.93%	19.49	5.64	1279	5556:46	261
TOTALS	51	3.99%	15.98	370	28.93%	19.49	5.64	1279	5563:22	261

---------- HOLD TIME, CALL AND DROP STATS

GRAPH IN 15 MINUTE INCREMENTS OF AVERAGE HOLD TIME FOR CALLS TAKEN INTO THIS IN-GROUP

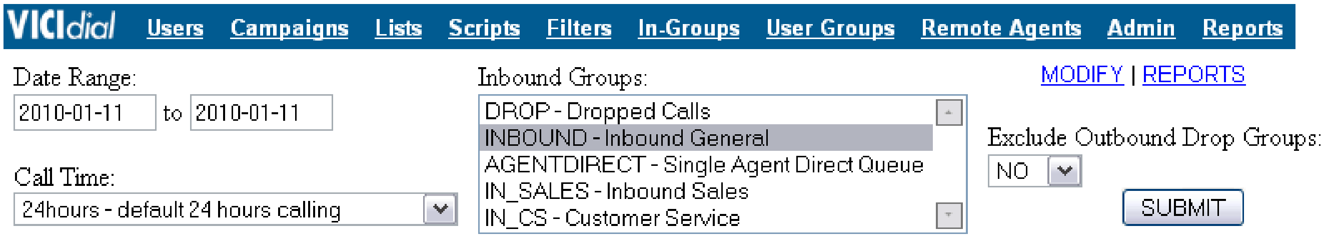
TIME 15 MIN INT	AVG HOLD TIME (sec) AVG	(in seconds) MAX	DROPS	TOTAL
+09:00-09:15+	0	0	0	1
09:15-09:30	18	28	0	21
09:30-09:45	15	21	0	31
09:45-10:00	12	25	0	22
+10:00-10:15+	32	64	1	30
10:15-10:30	17	30	1	22
10:30-10:45	13	15	1	18
10:45-11:00	5	9	1	21
+11:00-11:15+	8	12	0	20
11:15-11:30	15	25	0	25
11:30-11:45	21	65	1	29
11:45-12:00	0	0	0	19
+12:00-12:15+	0	0	0	16
12:15-12:30	20	48	1	21
12:30-12:45	17	40	4	41
12:45-13:00	33	82	3	29
+13:00-13:15+	34	69	2	22
13:15-13:30	28	64	4	37
13:30-13:45	27	110	4	30
13:45-14:00	9	22	2	24
+14:00-14:15+	23	48	0	30

Figure 37. Inbound Service Level Report

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.




```
Inbound Summary Hourly Report: |INBOUND|          2010-01-12 05:38:55

---------- MULTI-GROUP BREAKDOWN:
+------------------------------------------+--------+--------+-----------+---------+-----------+---------+---------+---------+
|                                          |        |        |           |         | TOTAL     | AVERAGE | MAXIMUM | TOTAL   |
|                                          | TOTAL  | TOTAL  | TOTAL     | AVERAGE | QUEUE     | QUEUE   | QUEUE   | ABANDON|
| IN-GROUP                                 | CALLS  | ANSWER | TALK      | TALK    | TIME      | TIME    | TIME    | CALLS   |
+------------------------------------------+--------+--------+-----------+---------+-----------+---------+---------+---------+
| INBOUND - Inbound Calls                  |    486 |    448 |   7:59:36 |    1:04 |     27:32 |    0:03 |    1:21 |      38 |
+------------------------------------------+--------+--------+-----------+---------+-----------+---------+---------+---------+
| TOTALS       In-Groups:    1             |    486 |    448 |   7:59:36 |    1:04 |     27:32 |    0:03 |    1:21 |      38 |
+------------------------------------------+--------+--------+-----------+---------+-----------+---------+---------+---------+

---------- INBOUND - Inbound Calls     HOURLY BREAKDOWN:
+------+--------+--------+-----------+---------+-----------+---------+---------+---------+
|      |        |        |           |         | TOTAL     | AVERAGE | MAXIMUM | TOTAL   |
|      | TOTAL  | TOTAL  | TOTAL     | AVERAGE | QUEUE     | QUEUE   | QUEUE   | ABANDON|
| HOUR | CALLS  | ANSWER | TALK      | TALK    | TIME      | TIME    | TIME    | CALLS   |
+------+--------+--------+-----------+---------+-----------+---------+---------+---------+
|  0   |      1 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       1 |
|  1   |      0 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       0 |
|  2   |      0 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       0 |
|  3   |      3 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       3 |
|  4   |      0 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       0 |
|  5   |      1 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       1 |
|  6   |      1 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       1 |
|  7   |      4 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       4 |
|  8   |     53 |     50 |     56:30 |    1:08 |      4:30 |    0:05 |    0:50 |       3 |
|  9   |     41 |     39 |     56:55 |    1:28 |      2:27 |    0:04 |    0:29 |       2 |
| 10   |     34 |     33 |     26:57 |    0:49 |      1:41 |    0:03 |    0:21 |       1 |
| 11   |     49 |     49 |     44:54 |    0:55 |      3:04 |    0:04 |    0:55 |       0 |
| 12   |     31 |     31 |     32:01 |    1:02 |      2:06 |    0:04 |    0:33 |       0 |
| 13   |     29 |     28 |     35:18 |    1:16 |      2:41 |    0:06 |    1:21 |       1 |
| 14   |     33 |     33 |     49:54 |    1:31 |      2:43 |    0:05 |    1:08 |       0 |
| 15   |     60 |     60 |     35:29 |    0:35 |      1:53 |    0:02 |    0:23 |       0 |
| 16   |     50 |     50 |     27:30 |    0:33 |      1:38 |    0:02 |    0:33 |       0 |
| 17   |     31 |     28 |     41:53 |    1:30 |      2:21 |    0:05 |    0:36 |       3 |
| 18   |     21 |     19 |     27:34 |    1:27 |      1:31 |    0:04 |    0:30 |       2 |
| 19   |     17 |     16 |     26:30 |    1:39 |      0:58 |    0:03 |    0:19 |       1 |
| 20   |     13 |     12 |     18:11 |    1:31 |      0:00 |    0:00 |    0:00 |       1 |
| 21   |      6 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       6 |
| 22   |      5 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       5 |
| 23   |      3 |      0 |      0:00 |    0:00 |      0:00 |    0:00 |    0:00 |       3 |
+------+--------+--------+-----------+---------+-----------+---------+---------+---------+
|TOTALS|    486 |    448 |   7:59:36 |    1:04 |     27:32 |    0:03 |    1:21 |      38 |
+------+--------+--------+-----------+---------+-----------+---------+---------+---------+


Run Time: 0 seconds
```

Figure 38. Inbound Summary Hourly Report

INBOIUND 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.

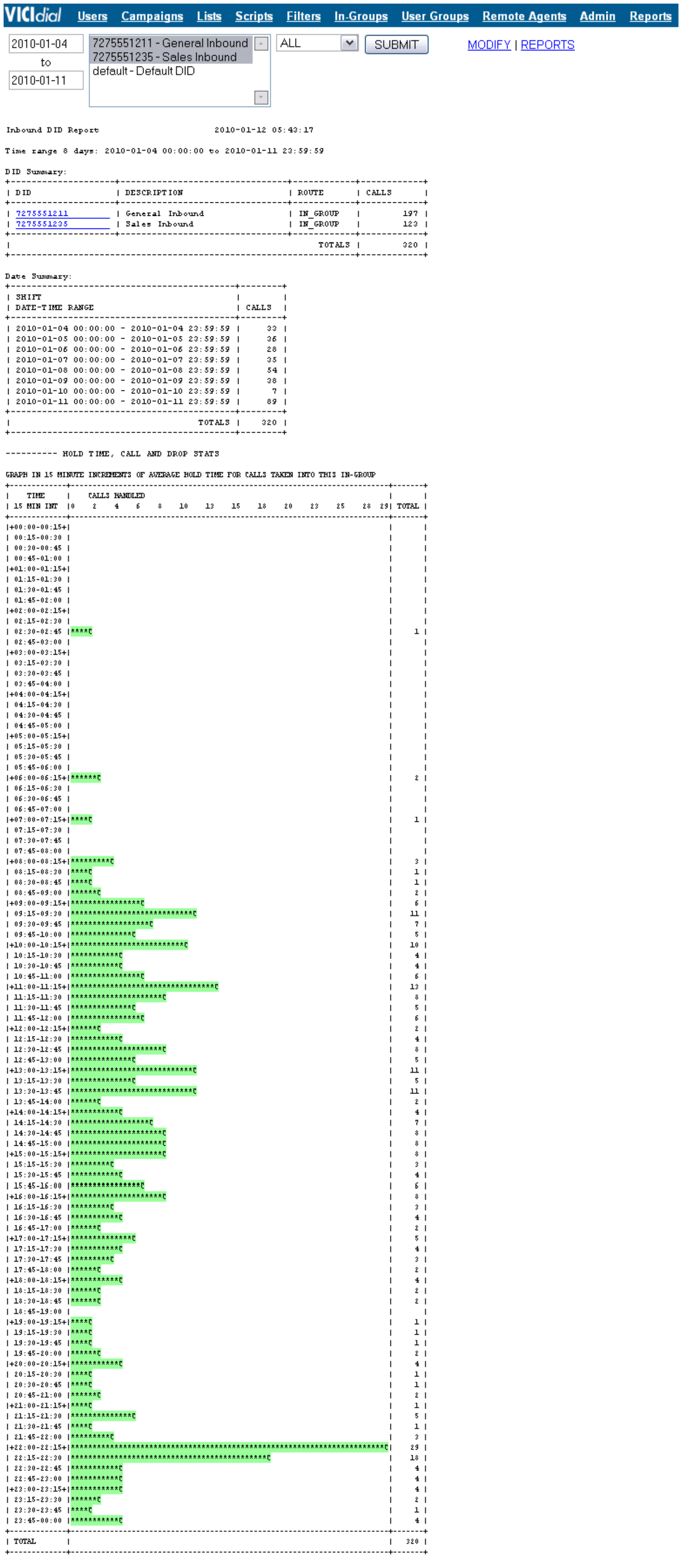
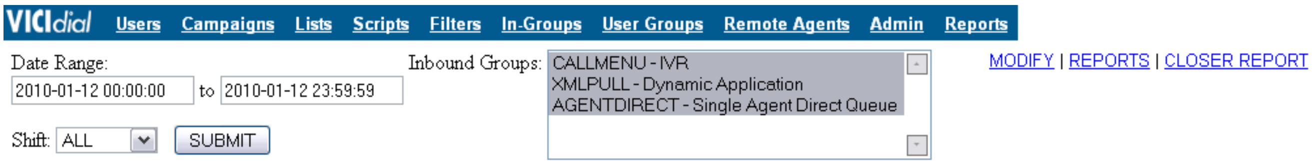


Figure 39. Inbound DID Report

INBOUND DID REPORT

The Inbound DID Report shows the statistics for calls passing through the ViciDial 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.




```
IVR Stats Report:  |CALLMENU|XMLPULL|AGENTDIRECT|          2010-01-12 08:16:16

Calls taken into this IVR:    2832
Calls with no CallerID:       0
Unique Callers:               2133
```

IVR CALLS	QUEUE CALLS	QUEUE DROP CALLS	QUEUE DROP PERCENT	IVR AVG TIME	TOTAL AVG TIME	CALL PATH
371	341	38	11.14%	5	263	SALES_IN
347	322	33	10.25%	34	357	SERVICE_IN / SERVICE_ENGLISH / SERVICE_QUESTIONS
329	320	21	6.56%	42	406	SALES_IN / SALES_UK
130	170	22	12.94%	5	344	TECH_SUPPORT
90	83	10	12.05%	81	373	SERVICE_IN / SERVICE_ENGLISH / SERVICE_QUESTIONS / SERVICE_QUEUE
81	64	7	10.94%	5	268	SALES_2
78	83	9	10.84%	87	522	SERVICE_IN / SERVICE_ENGLISH / SERVICE_QUESTIONS / SERVICE_QUEUE_2
71	67	9	13.43%	5	323	SALES_3
65	90	11	12.22%	5	295	SALES_4
65	68	14	20.59%	38	361	SERVICE_2 / SERVICE_QUEUE_3
63	59	11	18.64%	5	315	SALES_5
52	51	2	3.92%	95	423	SERVICE_IN / SERVICE_ENGLISH / SERVICE_QUESTIONS / SERVICE_QUEUE_6
50	46	15	32.61%	5	137	SALES_6
41	37	5	13.51%	5	238	SALES_7
38	25	5	20%	46	231	SERVICE_2 / SERVICE_QUEUE_3 / SHIPPING_AGI_XML
33	31	5	16.13%	30	218	SERVICE_3 / SERVICE_QUEUE_4
33	22	6	27.27%	27	262	SERVICE_IN / SERVICE_ENGLISH
29	24	3	12.5%	35	392	SERVICE_IN / SERVICE_QUEUE_5 / SERVICE_QUESTIONS_2
27	25	4	16%	5	252	EMPLOYMENT_1
26	25	6	24%	34	255	SALES_8 / SALES_UK
25	20	0	0%	97	338	SERVICE_IN / SERVICE_QUEUE_5 / SERVICE_QUESTIONS_2 / SERVICE_QUEUE_7
23	13	2	15.38%	29	180	SALES_5 / SHIPPING_AGI_XML
21	0	0	0%	53	53	SERVICE_3 / SERVICE_QUEUE_4 / SERVICE_QUEUE_8
21	0	0	0%	5	5	SERVICE_IN
19	6	2	33.33%	5	44	SALES_9
19	12	1	8.33%	61	178	SERVICE_3 / SERVICE_QUEUE_4 / SERVICE_QUESTIONS_3 / SHIPPING_AGI_XML
18	15	0	0%	65	245	SALES_8 / SALES_UK / SERVICE_QUESTIONS_4 / SHIPPING_AGI_XML
18	15	5	33.33%	5	154	PRESALES_1
16	16	1	6.25%	47	273	SERVICE_3 / SERVICE_QUEUE_4 / SERVICE_QUESTIONS_5
16	13	6	46.15%	5	165	PRESALES_2
15	0	0	0%	5	5	EMPLOYMENT_2

Figure 40. IVR(Call Menu) Report

IVR/CALLMENU REPORT

The IVR/Call Menu Report will show you the path that calls took through your ViciDial Call Menus and optionally into further in-groups.

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 “/”.

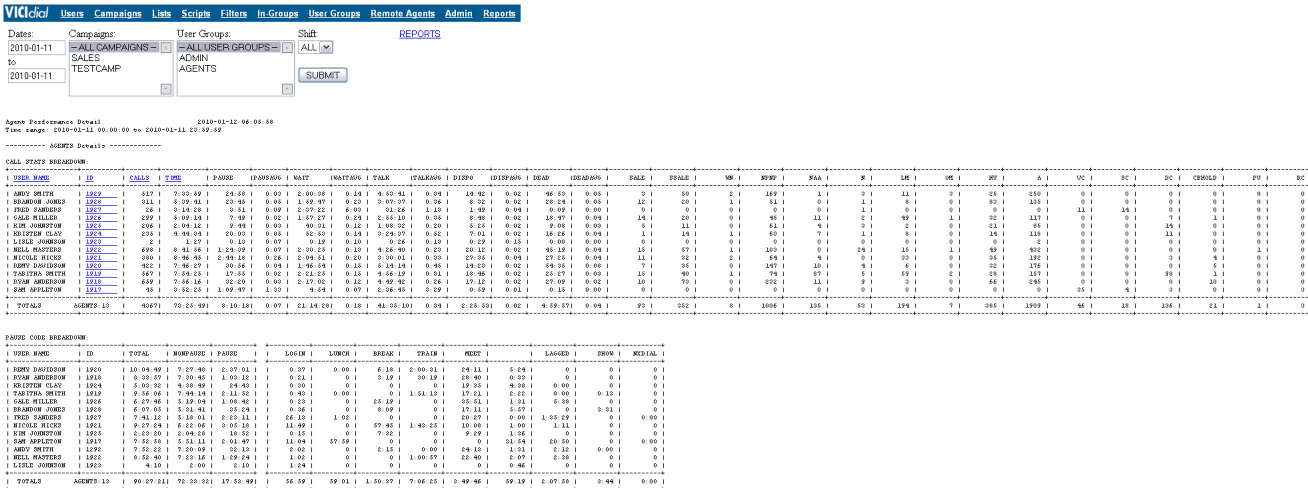
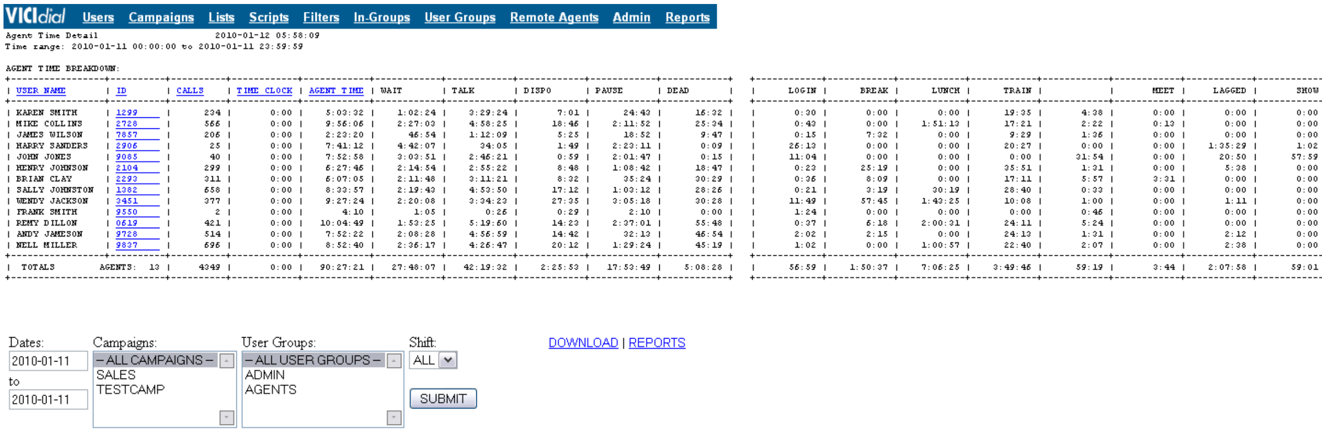


Figure 41. ViciDial Agent Performance Detail Report

AGENT PERFORMANCE DETAIL REPORT

The Agent Performance Detail Report is an accounting of an Agent's time for a pre-defined shift that they are logged into a campaign. 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 shift is coded as 9:00 AM to 3:15 PM server time while the PM shift is from 3:16 PM to 11:00 PM. You can also select the entire day and narrow the results down by user group.

Also in the Performance Detail report is a section showing the break down of pause time for the agent when logged in to ViciDial. 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.



Agent Time Detail 2010-01-12 05:58:09
Time range: 2010-01-11 00:00:00 to 2010-01-11 23:59:59

AGENT TIME BREAKDOWN:

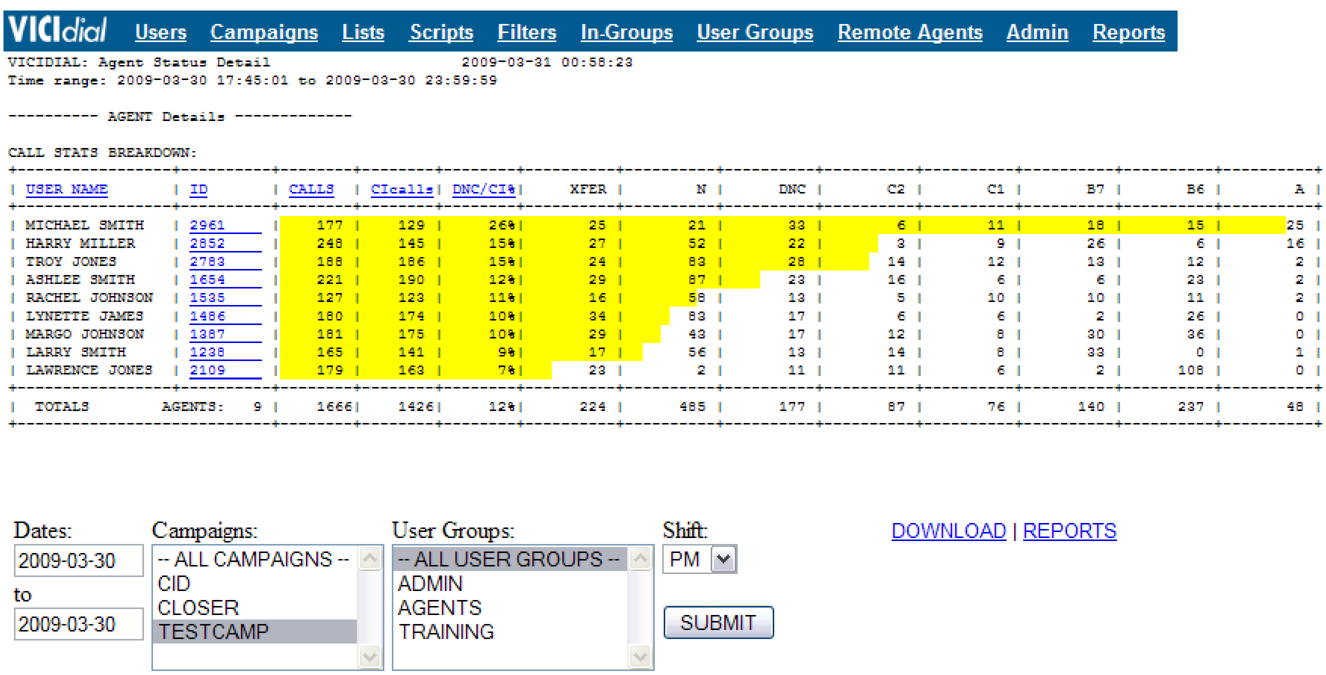
USER NAME	ID	CALLS	TIME CLOCK	AGENT TIME	WAIT	TALK	DISPO	PAUSE	DEAD
KAREN SMITH	1299	234	0:00	5:03:32	1:02:24	3:29:24	7:01	24:43	16:32
MIKE COLLINS	2728	566	0:00	9:56:06	2:27:03	4:58:25	18:46	2:11:52	25:34
JAMES WILSON	7857	206	0:00	2:23:20	46:54	1:12:09	5:25	18:52	9:47
HARRY SANDERS	2906	25	0:00	7:41:12	4:42:07	34:05	1:49	2:23:11	0:09
JOHN JONES	9085	40	0:00	7:52:58	3:03:51	2:46:21	0:59	2:01:47	0:15
HENRY JOHNSON	2104	299	0:00	6:27:46	2:14:54	2:55:22	8:48	1:08:42	18:47
BRIAN CLAY	2293	311	0:00	6:07:05	2:11:48	3:11:21	8:32	35:24	30:29
SALLY JOHNSTON	1382	658	0:00	8:33:57	2:19:43	4:53:50	17:12	1:03:12	28:26
WENDY JACKSON	3451	377	0:00	9:27:24	2:20:08	3:34:23	27:35	3:05:18	30:28
FRANK SMITH	9550	2	0:00	4:10	1:05	0:26	0:29	2:10	0:00
REMY DILLON	0619	421	0:00	10:04:49	1:53:25	5:19:60	14:23	2:37:01	55:48
ANDY JAMESON	9728	514	0:00	7:52:22	2:08:28	4:56:59	14:42	32:13	46:54
NELL MILLER	9837	696	0:00	8:52:40	2:36:17	4:26:47	20:12	1:29:24	45:19
TOTALS	AGENTS: 13	4349	0:00	90:27:21	27:48:07	42:19:32	2:25:53	17:53:49	5:08:28

USER NAME	LOGIN	BREAK	LUNCH	TRAIN		MEET	LAGGED	SHOW
KAREN SMITH	0:30	0:00	0:00	19:35	4:38	0:00	0:00	0:00
MIKE COLLINS	0:43	0:00	1:51:13	17:21	2:22	0:13	0:00	0:00
JAMES WILSON	0:15	7:32	0:00	9:29	1:36	0:00	0:00	0:00
HARRY SANDERS	26:13	0:00	0:00	20:27	0:00	0:00	1:35:29	1:02
JOHN JONES	11:04	0:00	0:00	0:00	31:54	0:00	20:50	57:59
HENRY JOHNSON	0:23	25:19	0:00	35:51	1:31	0:00	5:38	0:00
BRIAN CLAY	0:36	8:09	0:00	17:11	5:57	3:31	0:00	0:00
SALLY JOHNSTON	0:21	3:19	30:19	28:40	0:33	0:00	0:00	0:00
WENDY JACKSON	11:49	57:45	1:43:25	10:08	1:00	0:00	1:11	0:00
FRANK SMITH	1:24	0:00	0:00	0:00	0:46	0:00	0:00	0:00
REMY DILLON	0:37	6:18	2:00:31	24:11	5:24	0:00	0:00	0:00
ANDY JAMESON	2:02	2:15	0:00	24:13	1:31	0:00	2:12	0:00
NELL MILLER	1:02	0:00	1:00:57	22:40	2:07	0:00	2:38	0:00
TOTALS	56:59	1:50:37	7:06:25	3:49:46	59:19	3:44	2:07:58	59:01

Figure 42. ViciDial 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. This report can give you a better comparison tool of how an agent's time is being spent as compared to other agents.



VICIDIAL: Agent Status Detail 2009-03-31 00:58:23
Time range: 2009-03-30 17:45:01 to 2009-03-30 23:59:59

---------- AGENT Details -------------

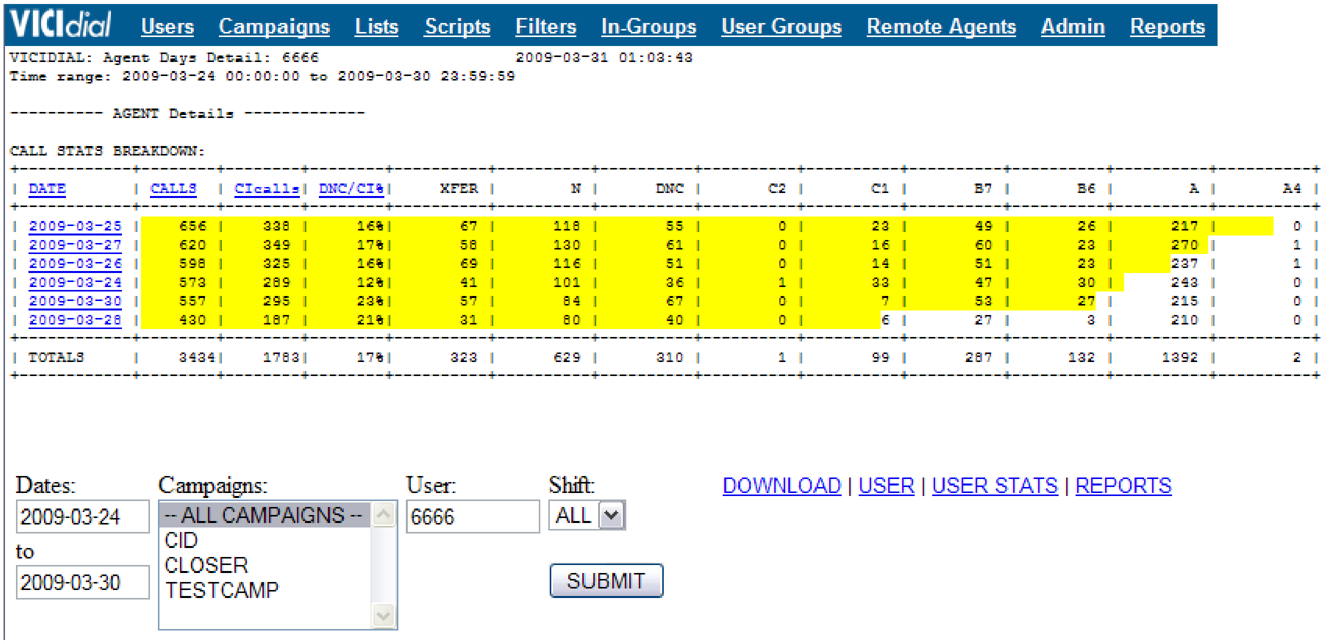
CALL STATS BREAKDOWN:

USER NAME	ID	CALLS	CIcalls	DNC/CI%	XFER	N	DNC	C2	C1	B7	B6	A
MICHAEL SMITH	2961	177	129	26%	25	21	33	6	11	18	15	25
HARRY MILLER	2852	248	145	15%	27	52	22	3	9	26	6	16
TROY JONES	2783	188	186	15%	24	83	28	14	12	13	12	2
ASHLEE SMITH	1654	221	190	12%	29	87	23	16	6	6	23	2
RACHEL JOHNSON	1535	127	123	11%	16	58	13	5	10	10	11	2
LYNETTE JAMES	1486	180	174	10%	34	83	17	6	6	2	26	0
MARGO JOHNSON	1387	181	175	10%	29	43	17	12	8	30	36	0
LARRY SMITH	1238	165	141	9%	17	56	13	14	8	33	0	1
LAWRENCE JONES	2109	179	163	7%	23	2	11	11	6	2	108	0
TOTALS	AGENTS: 9	1666	1426	12%	224	485	177	87	76	140	237	48

Figure 43. ViciDial 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.


VICIdial Users Campaigns Lists Scripts Filters In-Groups User Groups Remote Agents Admin Reports

VICIDIAL: Agent Days Detail: 6666 2009-03-31 01:03:43
Time range: 2009-03-24 00:00:00 to 2009-03-30 23:59:59

---------- AGENT Details -------------

CALL STATS BREAKDOWN:

DATE	CALLS	CIcalls	DNC/CI%	XFER	N	DNC	C2	C1	B7	B6	A	A4
2009-03-25	656	338	16%	67	118	55	0	23	49	26	217	0
2009-03-27	620	349	17%	58	130	61	0	16	60	23	270	1
2009-03-26	598	325	16%	69	116	51	0	14	51	23	237	1
2009-03-24	573	289	12%	41	101	36	1	33	47	30	243	0
2009-03-30	557	295	23%	57	84	67	0	7	53	27	215	0
2009-03-28	430	187	21%	31	80	40	0	6	27	3	210	0
TOTALS	3434	1783	17%	323	629	310	1	99	287	132	1392	2

Dates: 2009-03-24 to 2009-03-30
Campaigns: -- ALL CAMPAIGNS -- CID CLOSER TESTCAMP
User: 6666
Shift: ALL
SUBMIT
DOWNLOAD | USER | USER STATS | REPORTS

Figure 44. ViciDial Agent Status Days Report

AGENT DAYS DETAIL

The Agent Days 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.

FRONTER – CLOSER REPORT

This report can be useful if you have ViciDial agents sending calls to other ViciDial agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report at the top will show the fronter 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 fronter. This section shows some additional information including the conversion percentage.

AGENT SPREADSHEET PERFORMANCE

The Agent spreadsheet performance report will give you information that is similar to the fronter-closer report, except it is designed to be exported into Excel or OpenOffice Spreadsheet.

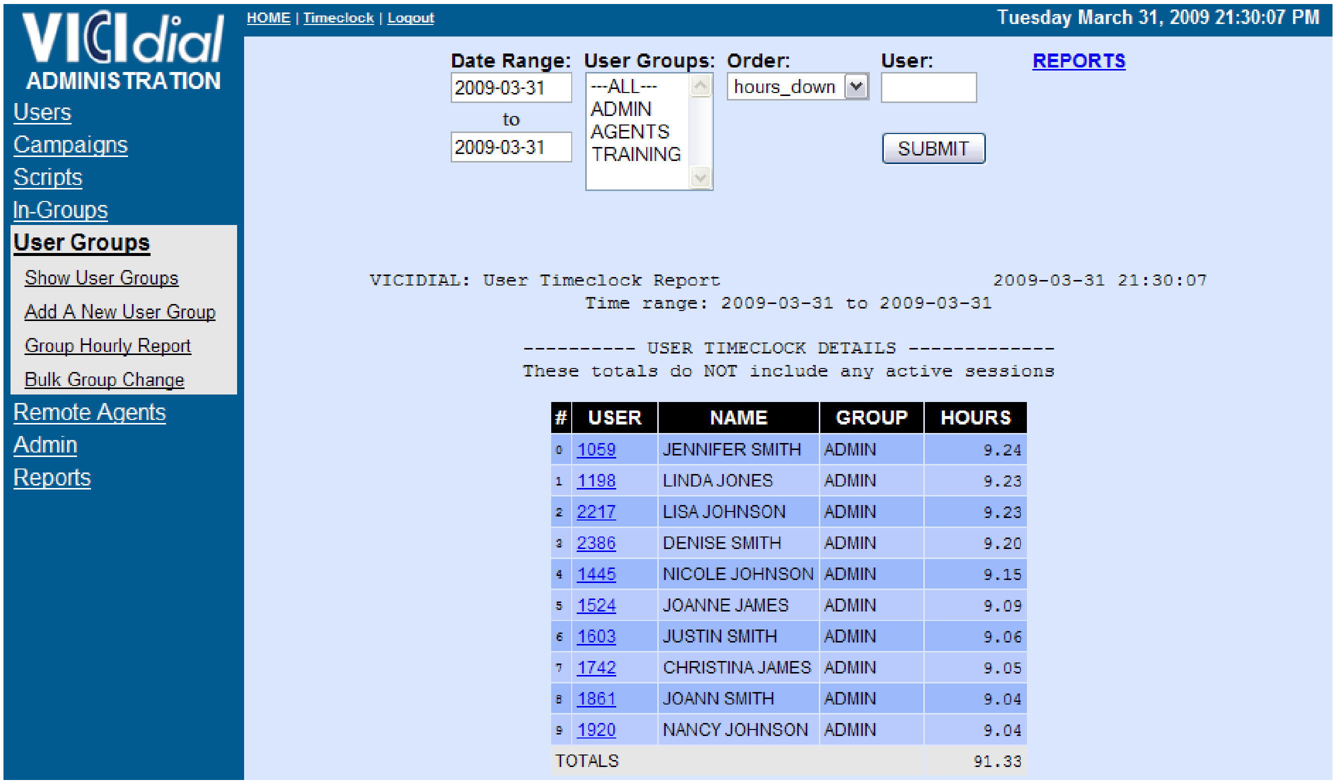


Figure 45. User Timeclock Report

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.

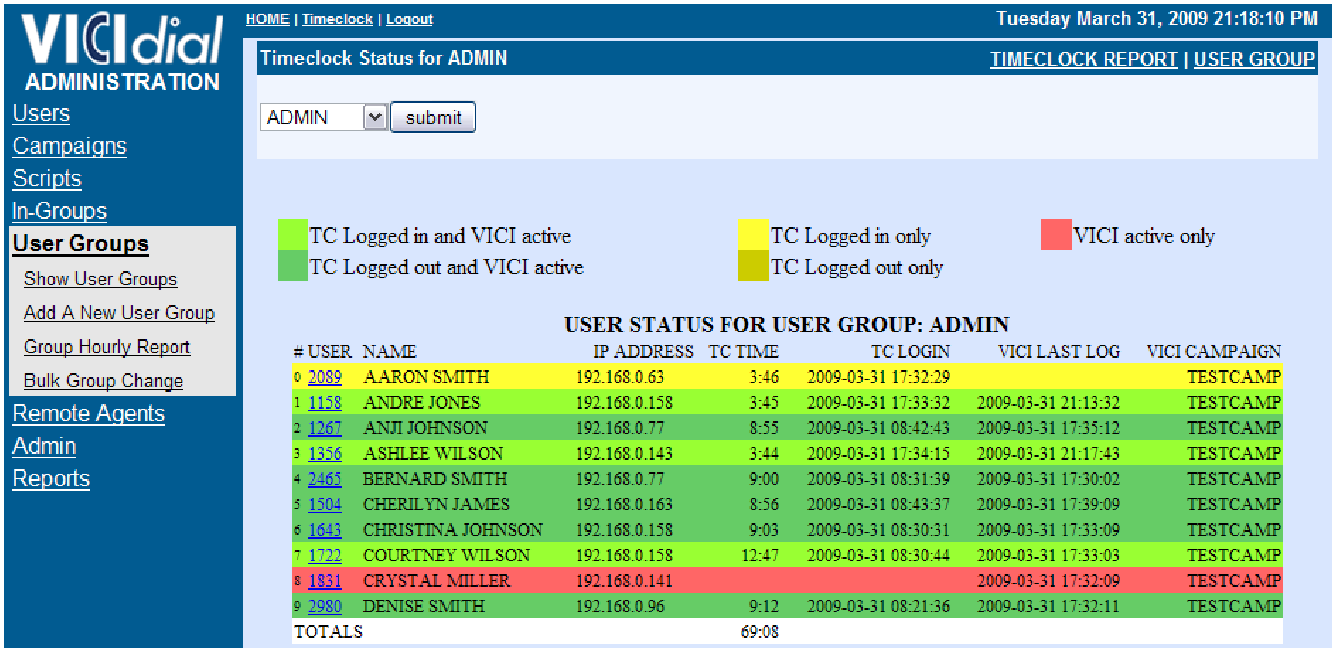


Figure 46. User Group Timeclock Status Report

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 ViciDial 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.

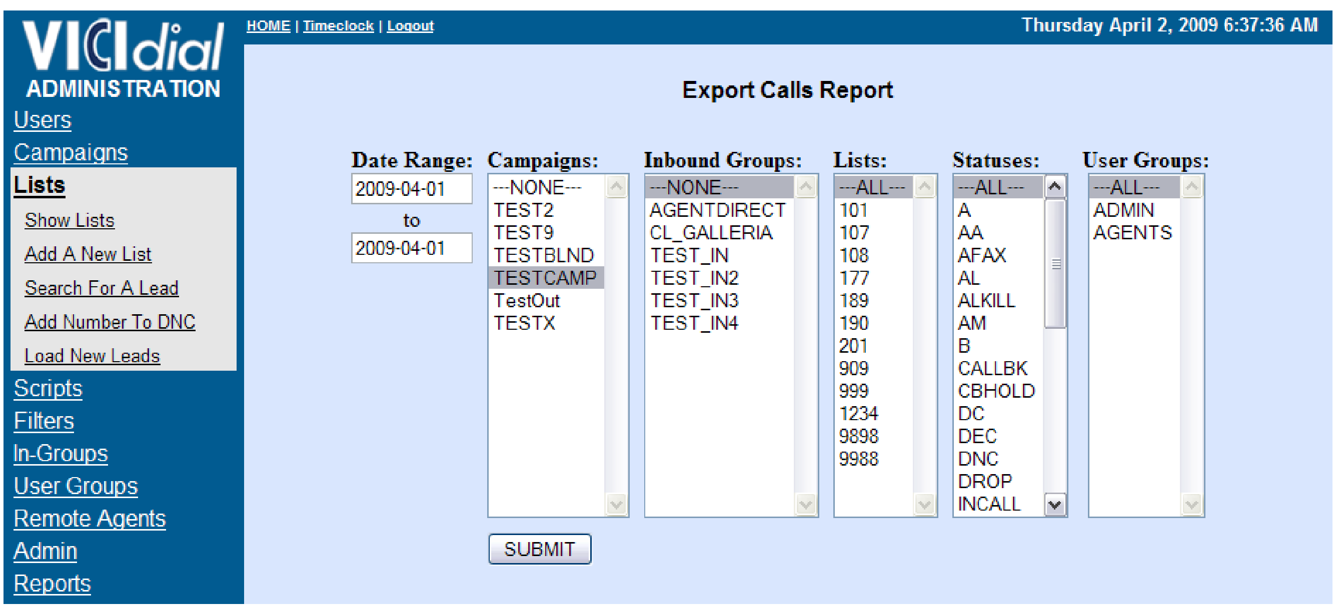
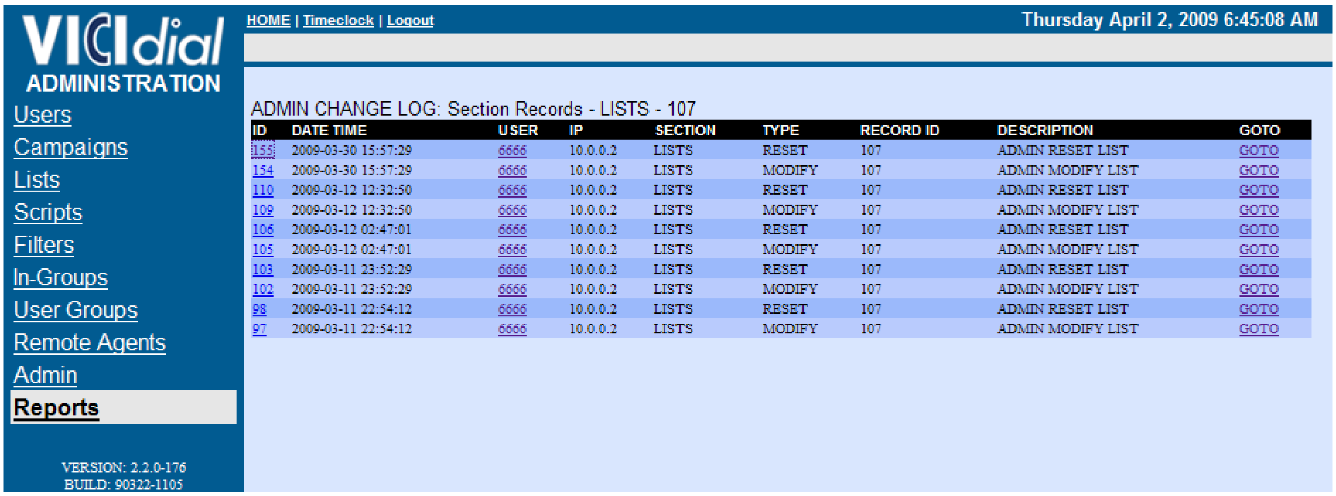


Figure 47. Calls Export Report

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_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,list_name,list_description,status_name
```



ID	DATE TIME	USER	IP	SECTION	TYPE	RECORD ID	DESCRIPTION	GOTO
155	2009-03-30 15:57:29	6666	10.0.0.2	LISTS	RESET	107	ADMIN RESET LIST	GOTO
154	2009-03-30 15:57:29	6666	10.0.0.2	LISTS	MODIFY	107	ADMIN MODIFY LIST	GOTO
110	2009-03-12 12:32:50	6666	10.0.0.2	LISTS	RESET	107	ADMIN RESET LIST	GOTO
109	2009-03-12 12:32:50	6666	10.0.0.2	LISTS	MODIFY	107	ADMIN MODIFY LIST	GOTO
106	2009-03-12 02:47:01	6666	10.0.0.2	LISTS	RESET	107	ADMIN RESET LIST	GOTO
105	2009-03-12 02:47:01	6666	10.0.0.2	LISTS	MODIFY	107	ADMIN MODIFY LIST	GOTO
103	2009-03-11 23:52:29	6666	10.0.0.2	LISTS	RESET	107	ADMIN RESET LIST	GOTO
102	2009-03-11 23:52:29	6666	10.0.0.2	LISTS	MODIFY	107	ADMIN MODIFY LIST	GOTO
98	2009-03-11 22:54:12	6666	10.0.0.2	LISTS	RESET	107	ADMIN RESET LIST	GOTO
97	2009-03-11 22:54:12	6666	10.0.0.2	LISTS	MODIFY	107	ADMIN MODIFY LIST	GOTO

Figure 48. Admin Changes Log Listing example for List ID 107

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.

Server-Specific Reports

The second set of reports are specific to only one ViciDial 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.

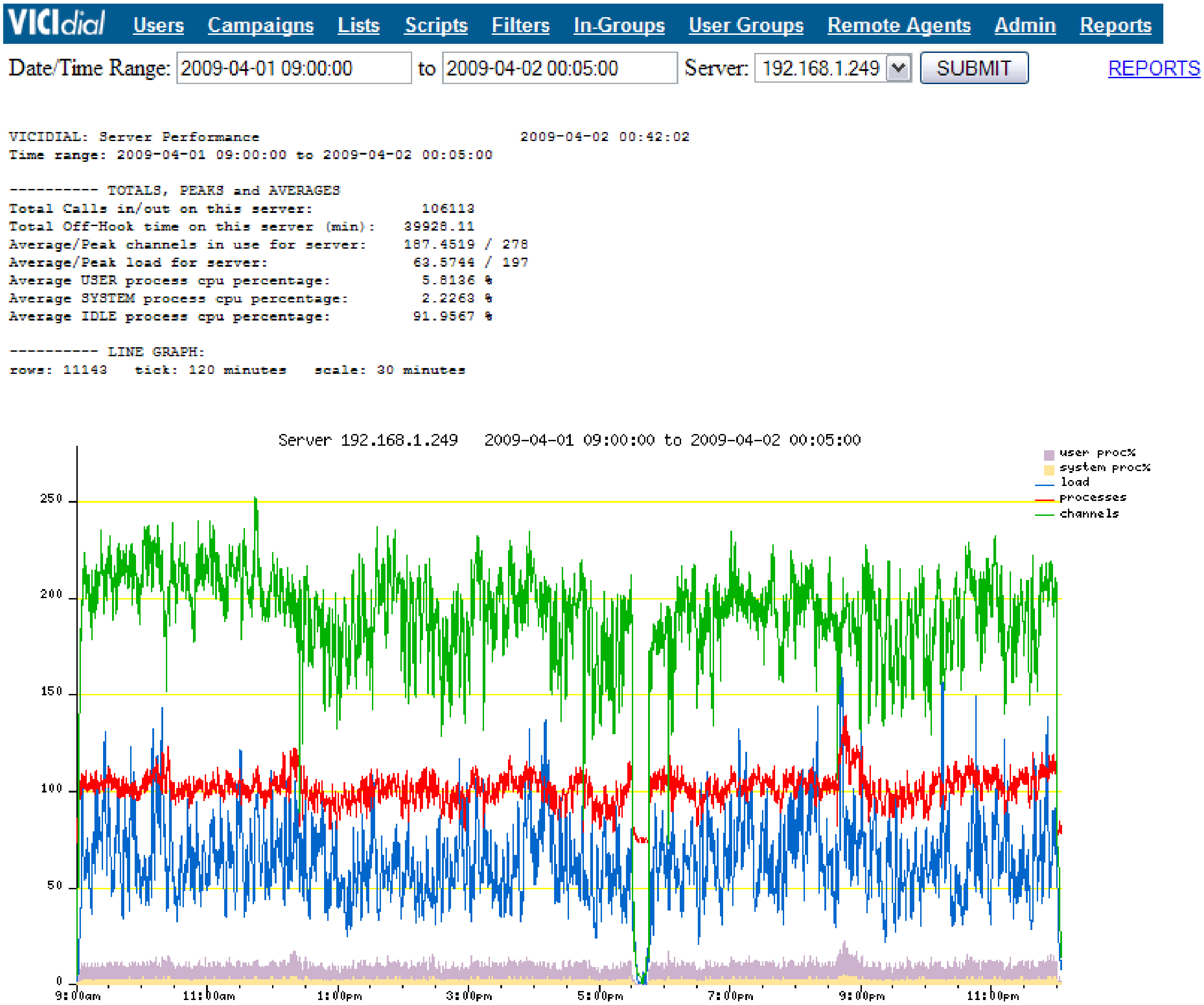
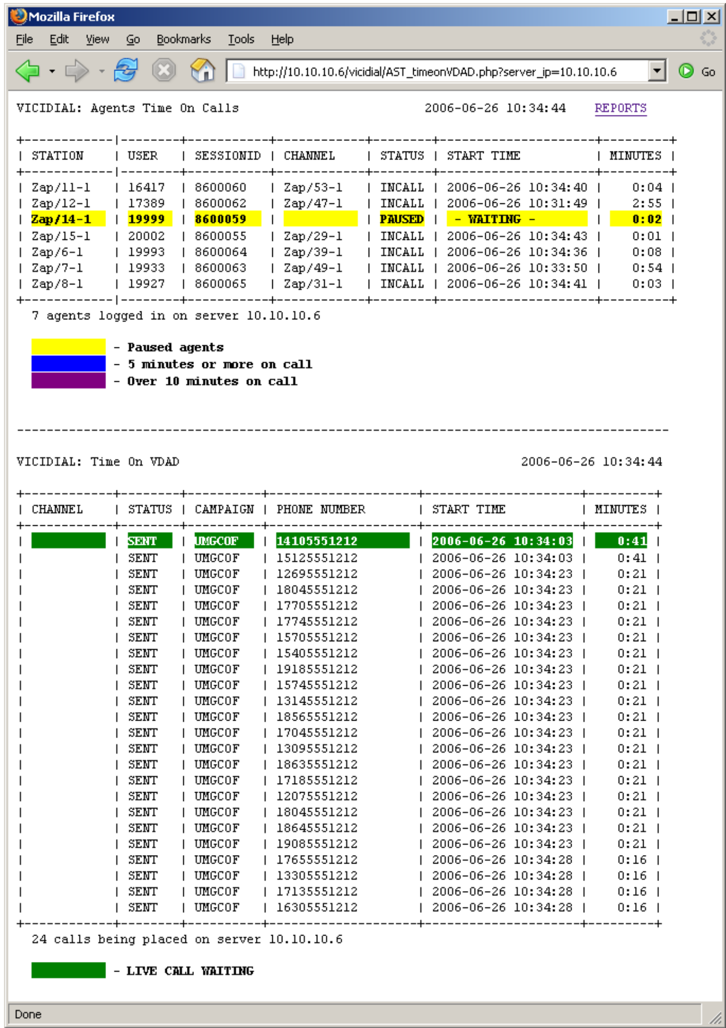


Figure 49. Server Performance Report

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 ViciDial. 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.



VICIDIAL: Agents Time On Calls 2006-06-26 10:34:44 REPORTS

STATION	USER	SESSIONID	CHANNEL	STATUS	START TIME	MINUTES
Zap/11-1	16417	8600060	Zap/53-1	INCALL	2006-06-26 10:34:40	0:04
Zap/12-1	17389	8600062	Zap/47-1	INCALL	2006-06-26 10:31:49	2:55
Zap/14-1	**19999**	**8600059**		**PAUSED**	**- WAITING -**	**0:02**
Zap/15-1	20002	8600055	Zap/29-1	INCALL	2006-06-26 10:34:43	0:01
Zap/6-1	19993	8600064	Zap/39-1	INCALL	2006-06-26 10:34:36	0:08
Zap/7-1	19933	8600063	Zap/49-1	INCALL	2006-06-26 10:33:50	0:54
Zap/8-1	19927	8600065	Zap/31-1	INCALL	2006-06-26 10:34:41	0:03

7 agents logged in on server 10.10.10.6

- **Paused agents**
- **5 minutes or more on call**
- **Over 10 minutes on call**

VICIDIAL: Time On VDAD 2006-06-26 10:34:44

CHANNEL	STATUS	CAMPAIGN	PHONE NUMBER	START TIME	MINUTES
	SENT	**UMGCOF**	**14105551212**	**2006-06-26 10:34:03**	**0:41**
	SENT	UMGCOF	15125551212	2006-06-26 10:34:03	0:41
	SENT	UMGCOF	12695551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	18045551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	17705551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	17745551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	15705551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	15405551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	19185551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	15745551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	13145551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	18565551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	17045551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	13095551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	18635551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	17185551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	12075551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	18045551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	18645551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	19085551212	2006-06-26 10:34:23	0:21
	SENT	UMGCOF	17655551212	2006-06-26 10:34:28	0:16
	SENT	UMGCOF	13305551212	2006-06-26 10:34:28	0:16
	SENT	UMGCOF	17135551212	2006-06-26 10:34:28	0:16
	SENT	UMGCOF	16305551212	2006-06-26 10:34:28	0:16

24 calls being placed on server 10.10.10.6

- **LIVE CALL WAITING**

Figure 50. Server-Specific Time on VDAD Report

TIME ON VDAD Report

This report will show all ViciDial activity on the 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 VICIDIAL FUNCTIONS

There are a few functions within the ViciDial suite that you can do through a phone connected to the ViciDial system.

Generating audio prompts through a phone

You have the ability to record audio prompts for Asterisk and ViciDial to use just by using the phone. To record a new prompt just dial 8168 on your phone connected to your ViciDial 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 ViciDial 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 ViciDial Agents

One other function that can be used through a ViciDial-attached phone is to listen in on a ViciDial 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 "Time On VDAD" Real-time report page. To finish, simply hangup the phone.

Another method of blind monitoring allows you to go from session to session on a single ViciDial 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 ViciDial 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 ViciDial 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 ViciDial-attached phone. Once the number is dialed, both parties will hear the entry tone(double tone) and the Manager can talk to and listen to both of the other parties on the call. To finish, simply hang up the phone.

QUEUEMETRICS INTEGRATION

QueueMetrics is a proprietary statistical analysis program suite created by Loway Research to work with Asterisk-based call centers. ViciDial fully integrates with the QueueMetrics statistical analysis package through it's 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 ViciDial.

To configure ViciDial to create logs for QueueMetrics to analyze, look at the Admin → System Settings section of this manual, and have your System Administrator read the QUEUEMETRICS.txt document in the ViciDial 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/.

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, ViciDial can integrate with Vtiger in the following ways:

- Export users and user groups from ViciDial to Vtiger
- Synchronize any user and user group changes made within ViciDial 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 ViciDial
- Web Form lookup of Vtiger Accounts, Leads and Vendors from the ViciDial agent screen
- Reactivation of deleted Accounts in Vtiger from ViciDial web form search
- Ability to create new Account activity records upon opening the Vtiger Account from the ViciDial Web Form, or automatically after every agent call attempt
- ViciDial status synchronization after each call to set the siccode field in Vtiger to the last selected VICIDIAL status
- Click-to-Dial phone numbers from the Vtiger Account and Account List screens to put the phone number into the same ViciDial agent's screen to dial that phone number as a manual dial call

To configure ViciDial 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 ViciDial 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. ViciDial 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/

SANGOMA CALL PROGRESS DETECTION(CPD) INTEGRATION

ViciDial 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 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. 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.

For more information on the Sangoma CPD, go to their website at: http://www.sangoma.com and look for the NetBorder Call Analyzer.

CLOSING

This has been a thorough overview of the administrative interfaces used to manage and run a ViciDial call center system. This system is quite flexible and simple alterations can usually be made without too much effort. If you have any suggestions for how to improve ViciDial in any way, please pass them on to your systems administrator or post a message at the project forum site(www.vicidial.org). For more information about ViciDial, go to: http://www.vicidial.com

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. ViciDial 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.

APPENDIX

Additional Screen-shots

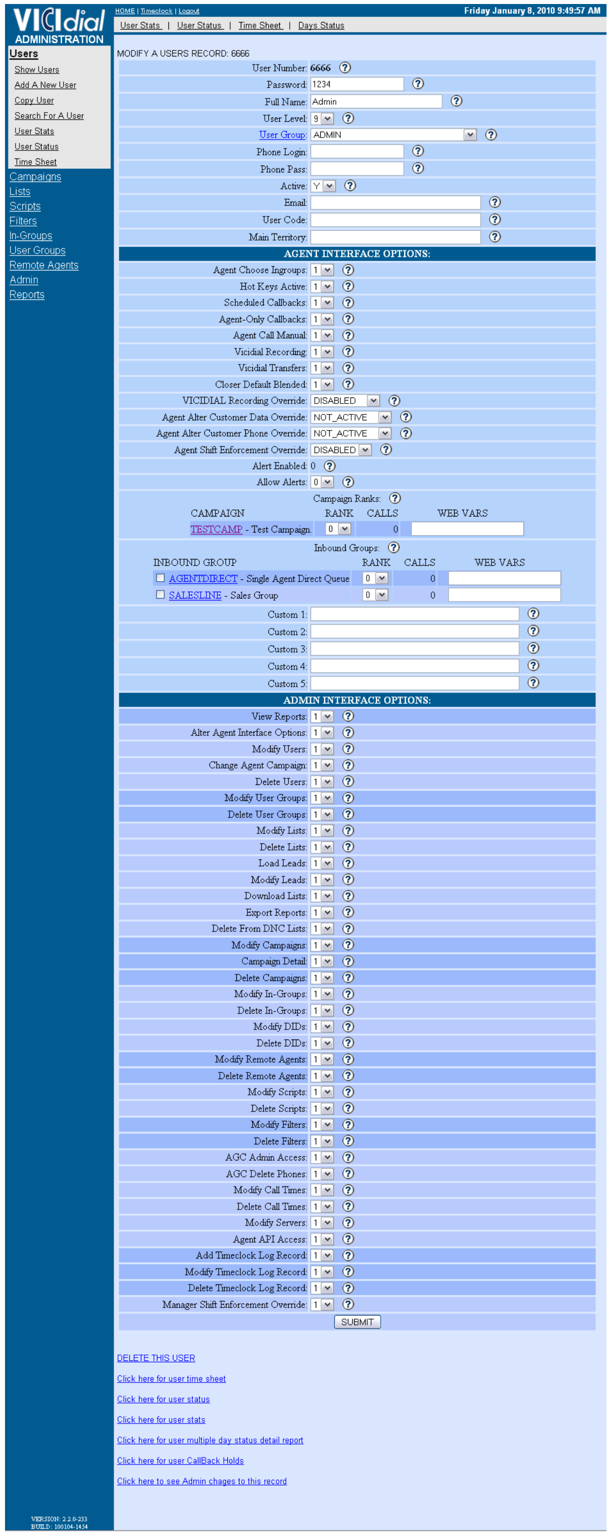


Figure 51. Vicidial User Modification Page

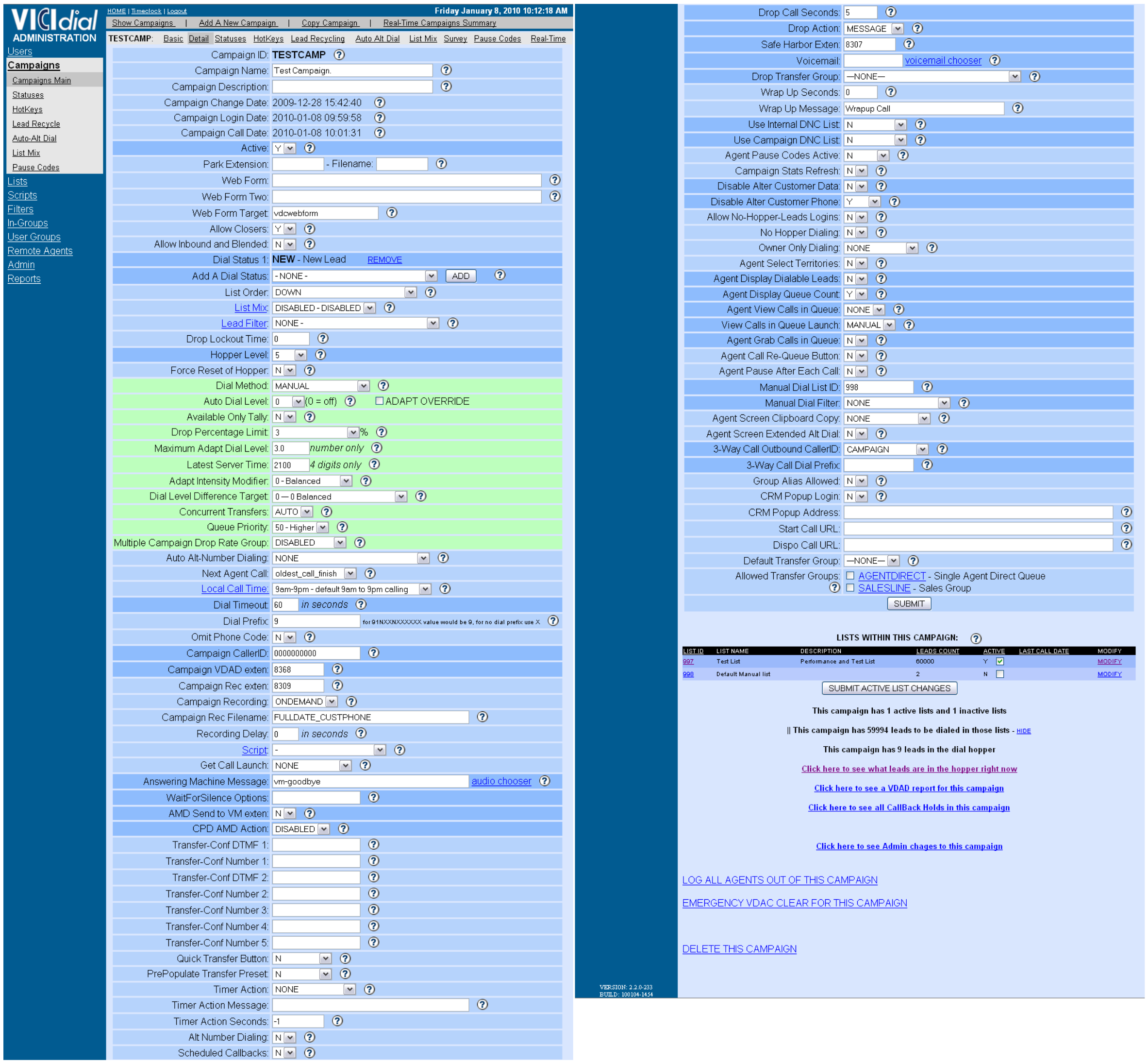


Figure 52. Vicidial Campaign Modification Page

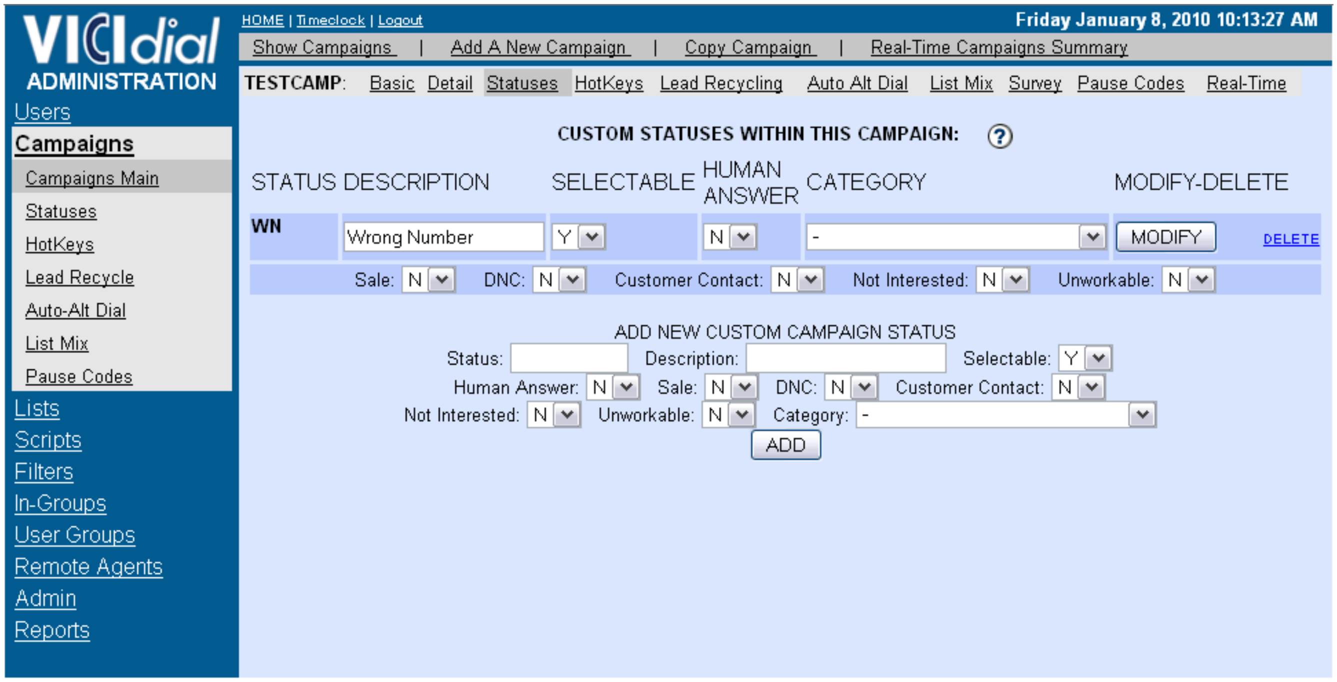


Figure 53. Vicidial Campaign Statuses Page

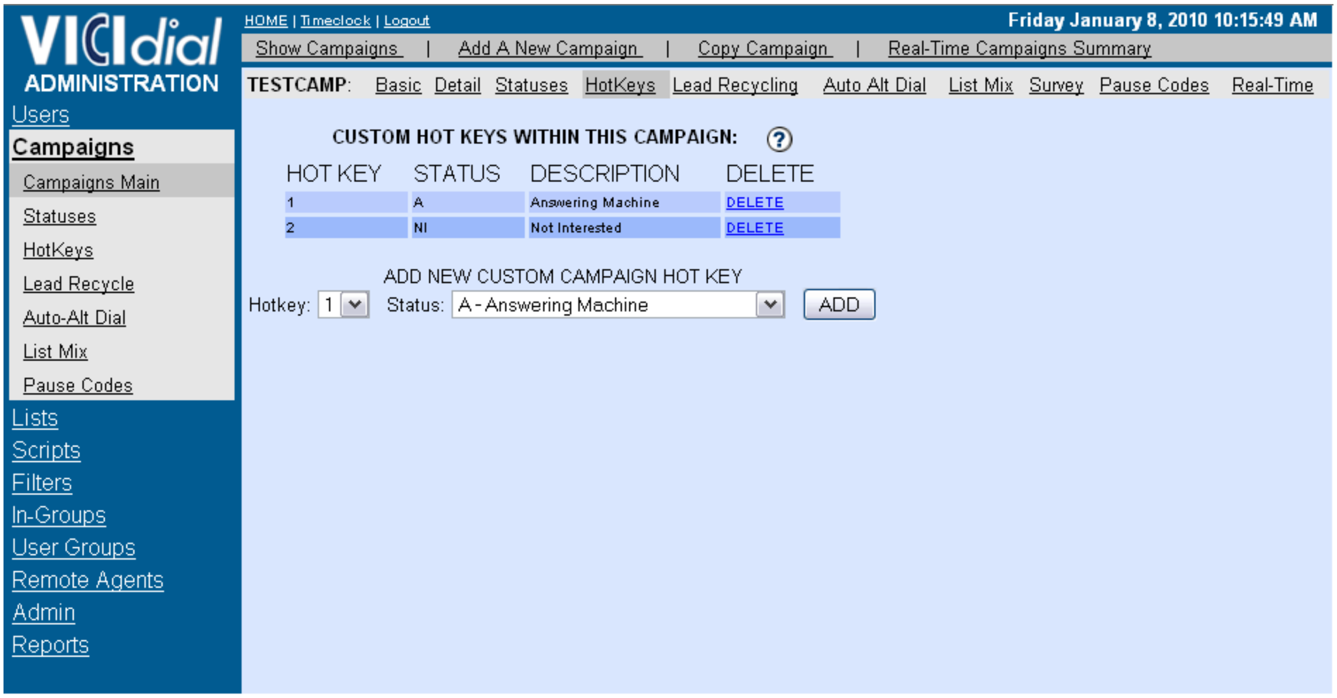


Figure 54. Vicidial Campaign HotKeys Page

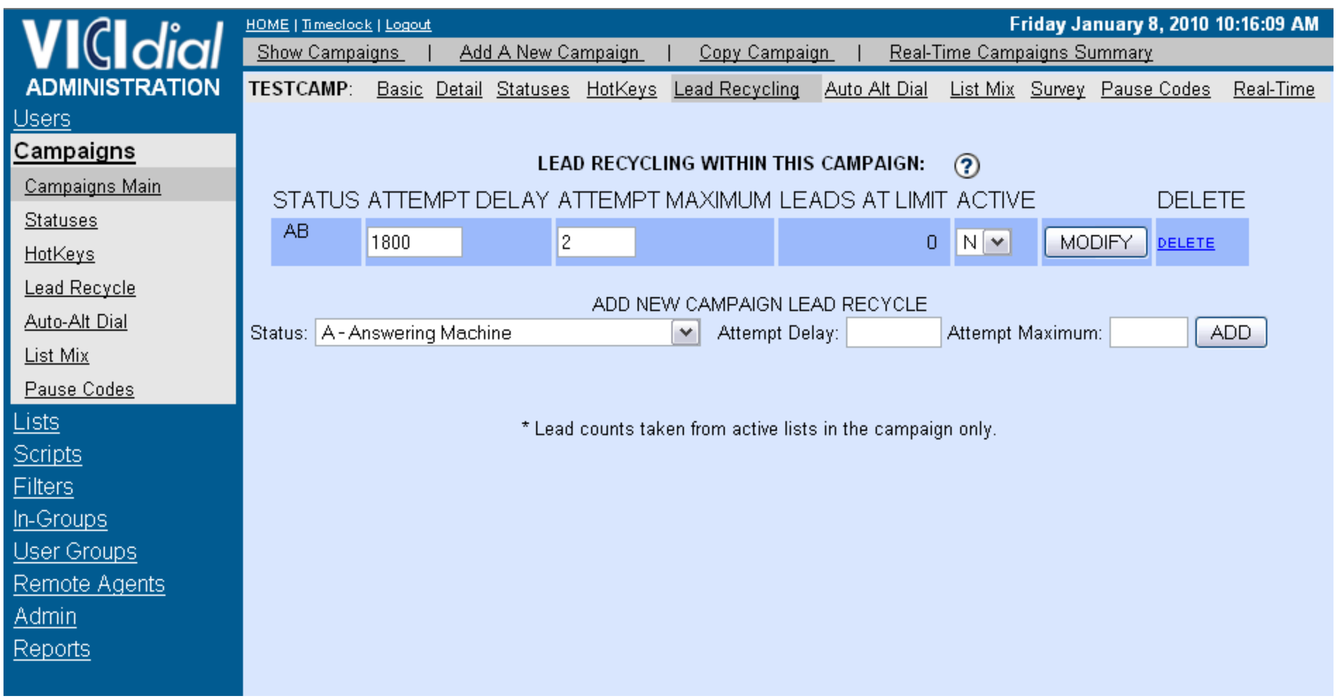


Figure 55. Vicidial Campaign Lead Recycling Page

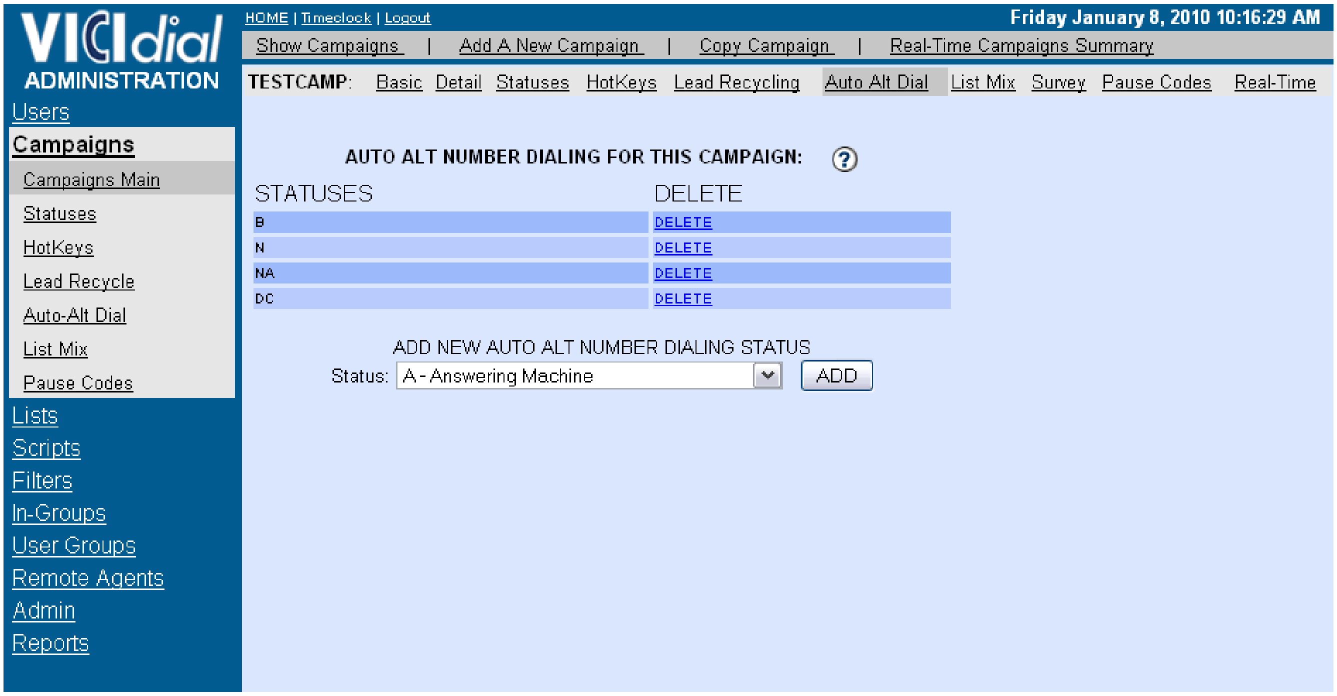


Figure 56. Vicidial Campaign Auto Alt-Dial Page

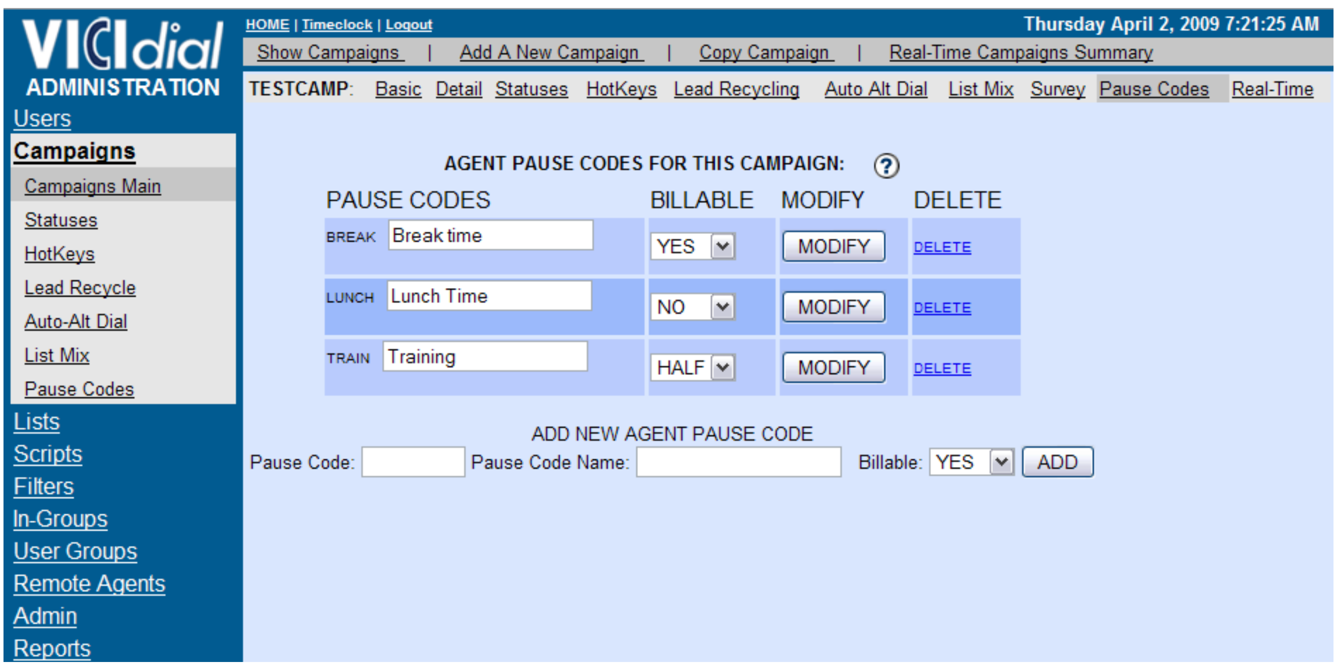


Figure 57. Vicidial Campaign Pause Codes Page

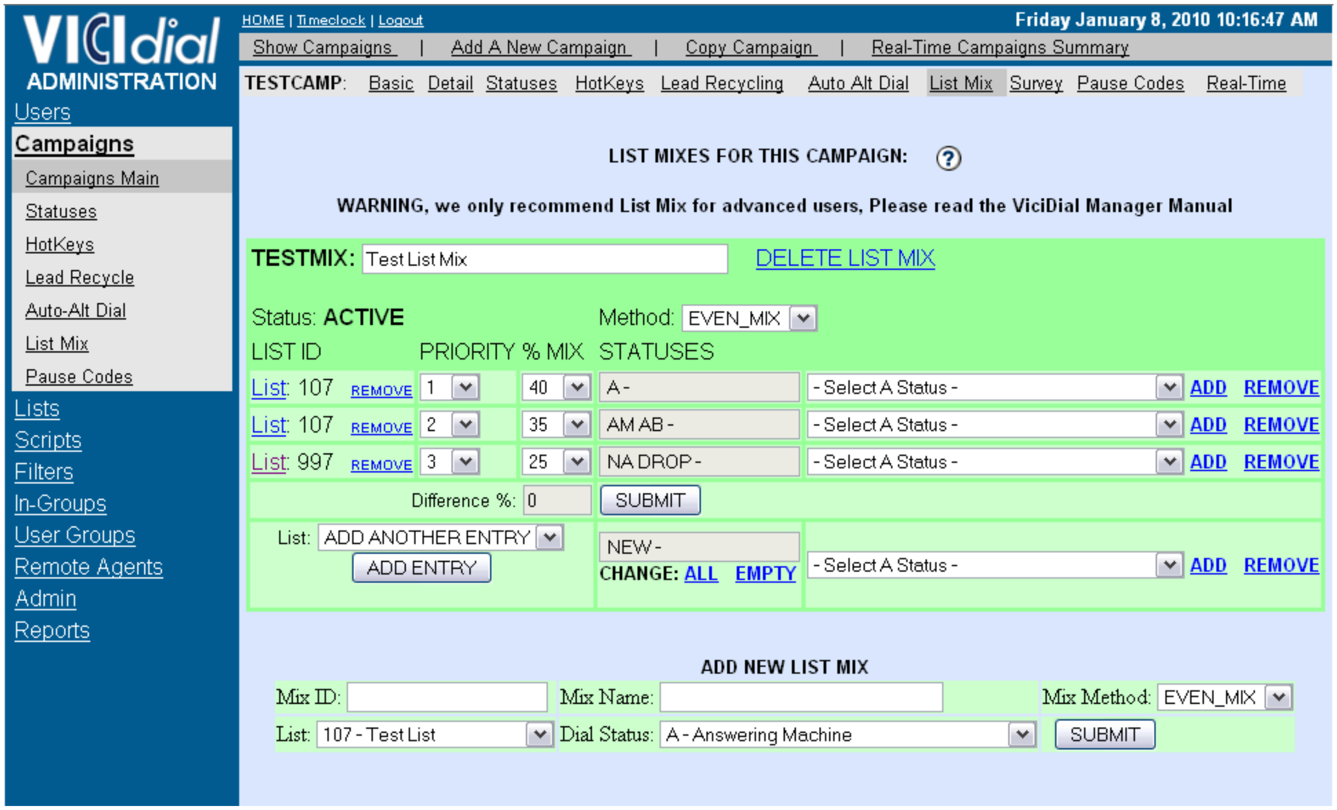


Figure 58. Vicidial Campaign List Mix Page

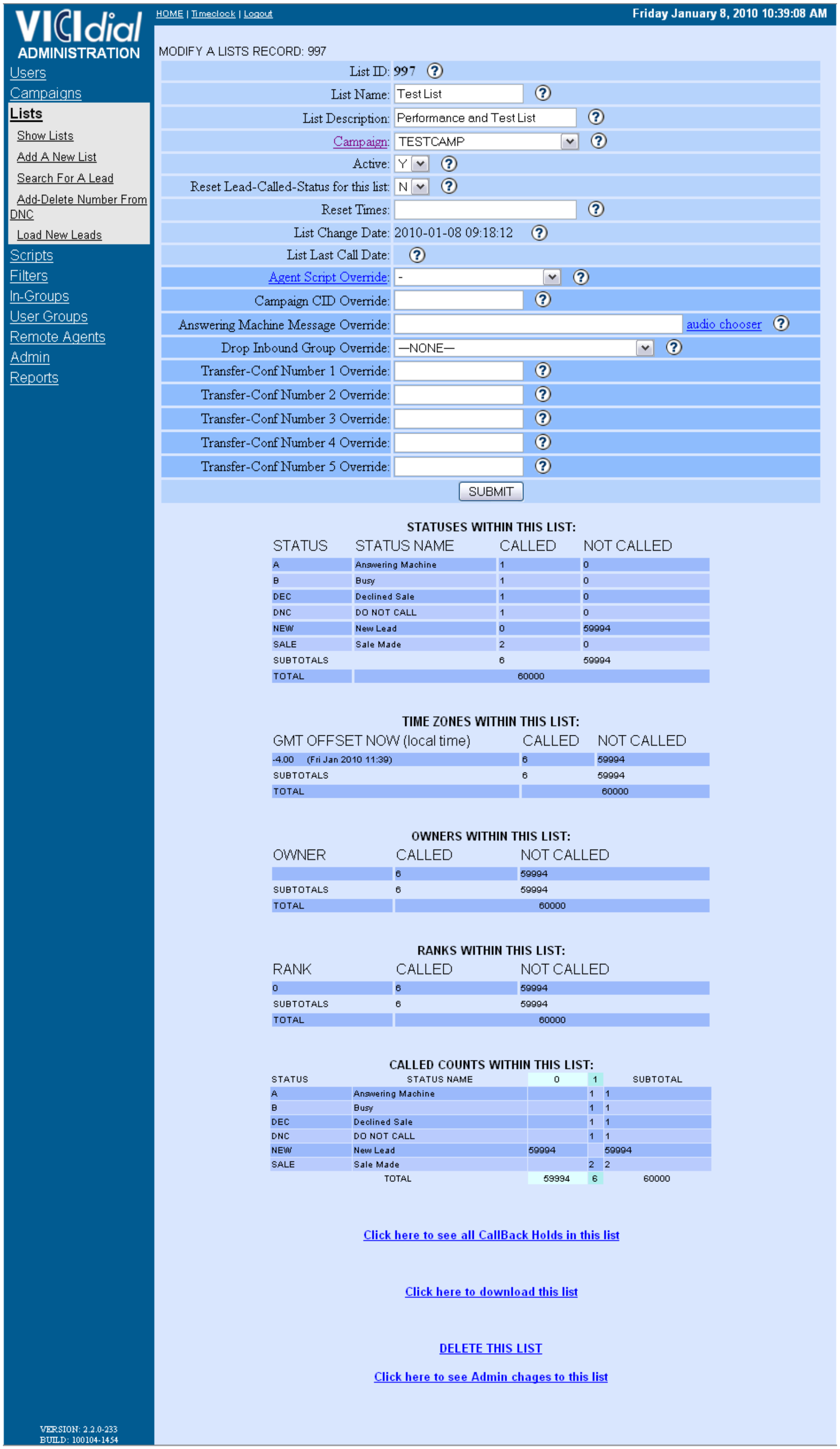


Figure 59. Vicidial List Modification Page

Figure 60. Vicidial Script Modification Page

Figure 61. Vicidial Filter Modification Page

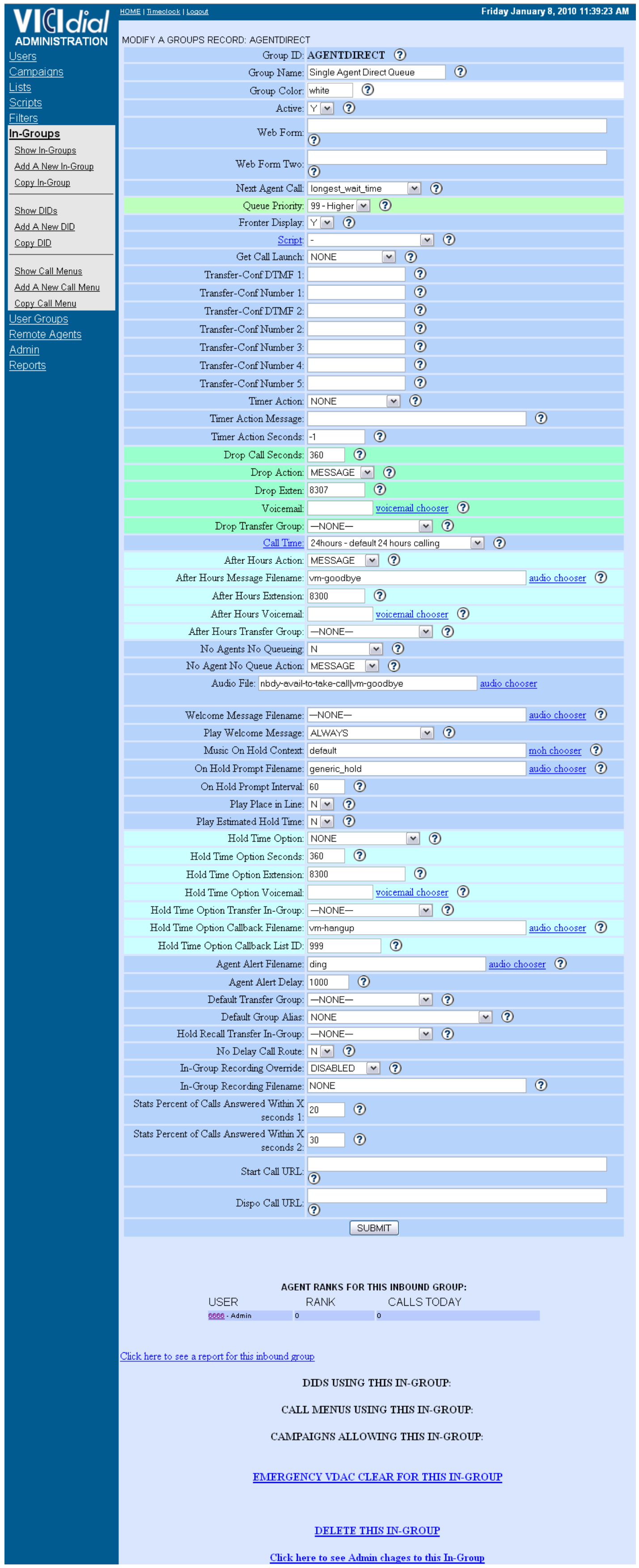


Figure 62. Vicidial In-Group Modification Page

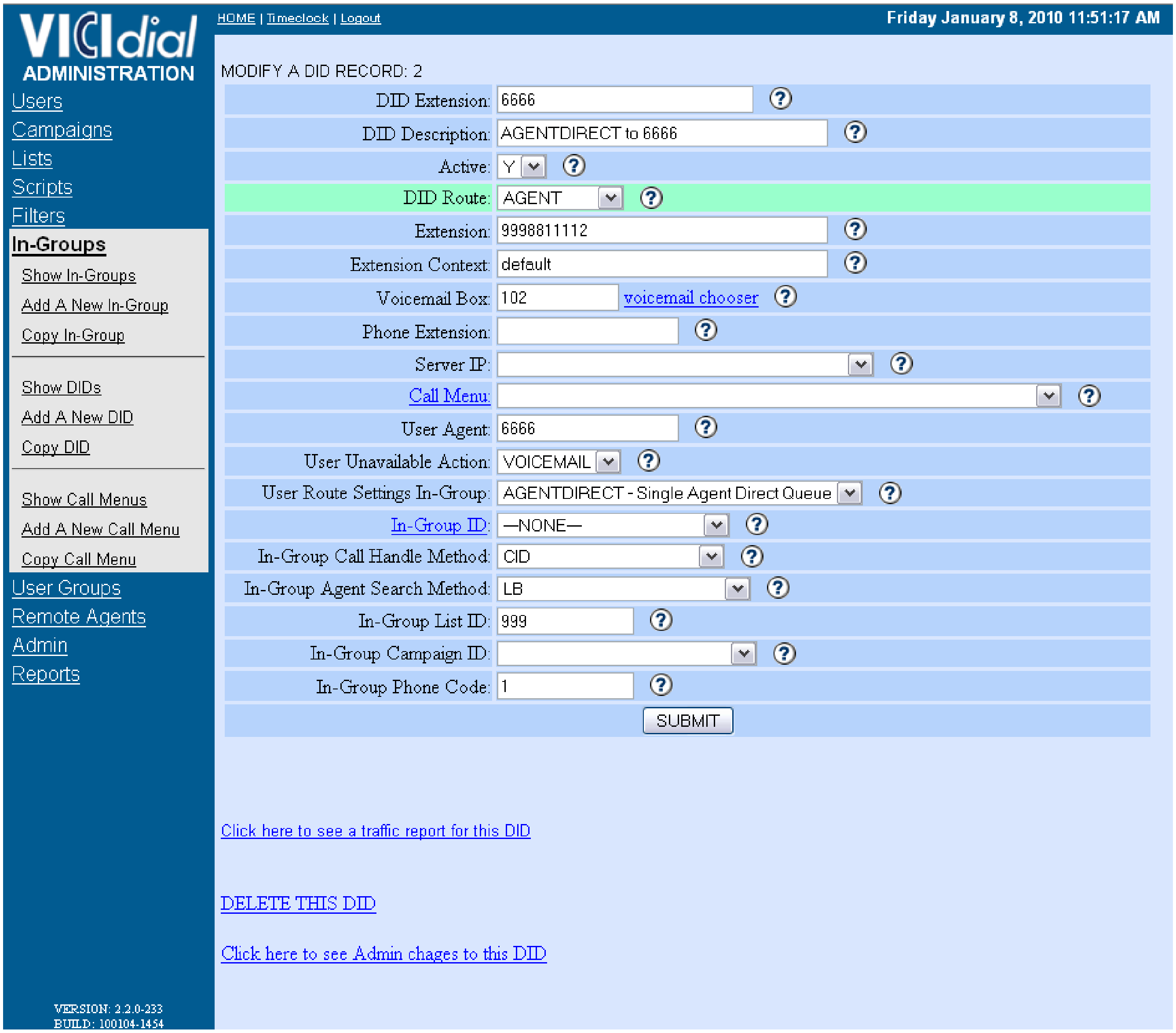


Figure 63. ViciDial DID Modification Page

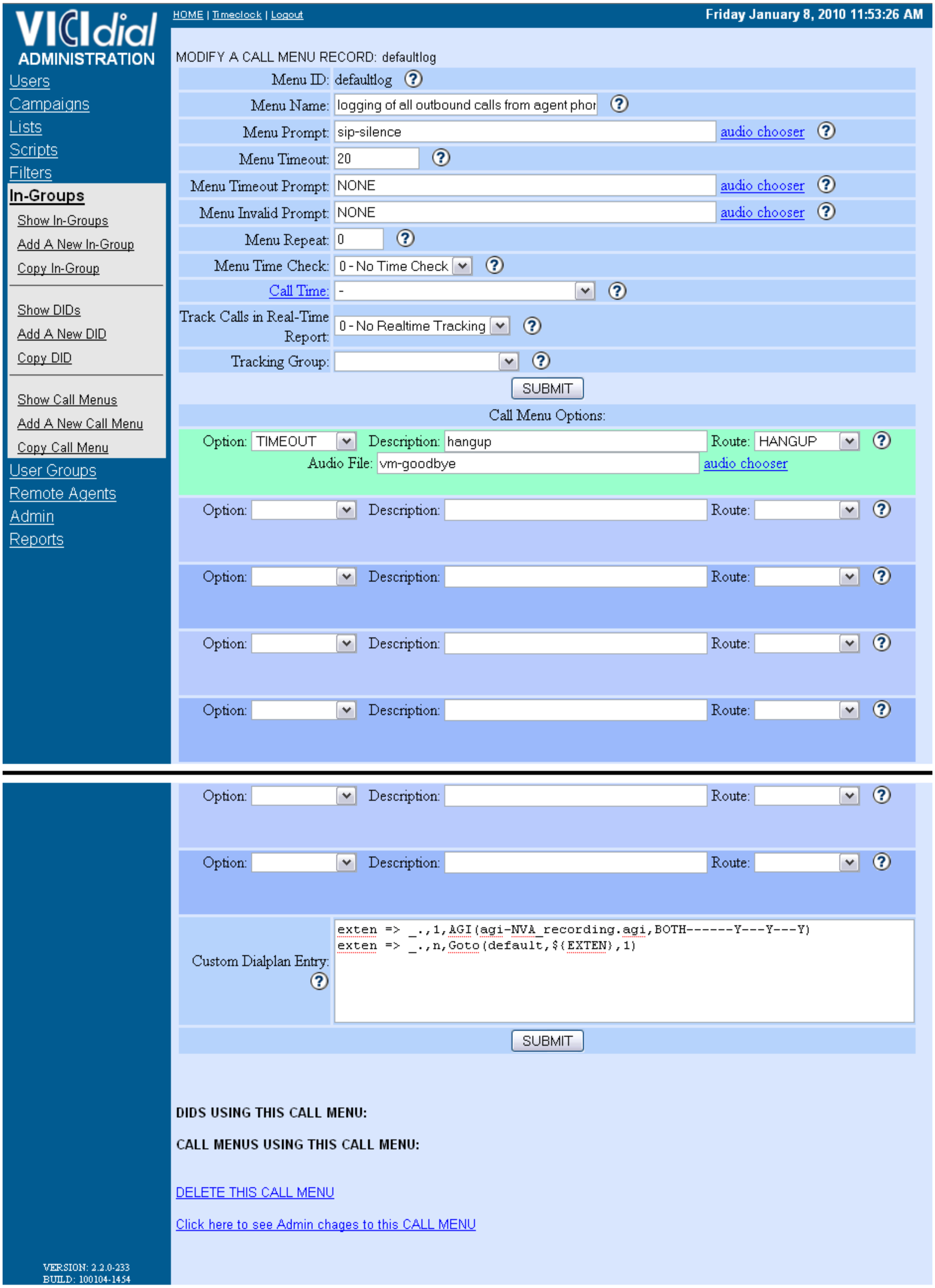


Figure 64. ViciDial Call Menu Modification Page

Figure 65. Vicidial User Groups Modification Page

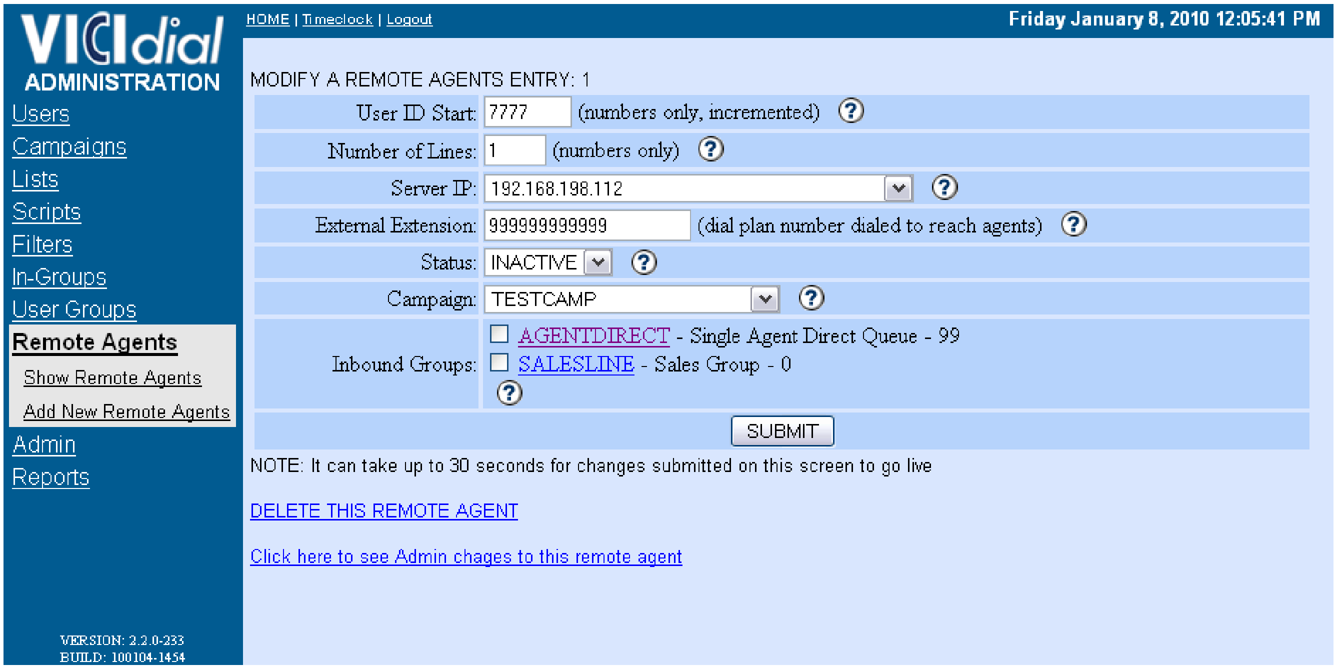


Figure 66. Vicidial Remote Agent Modification Page

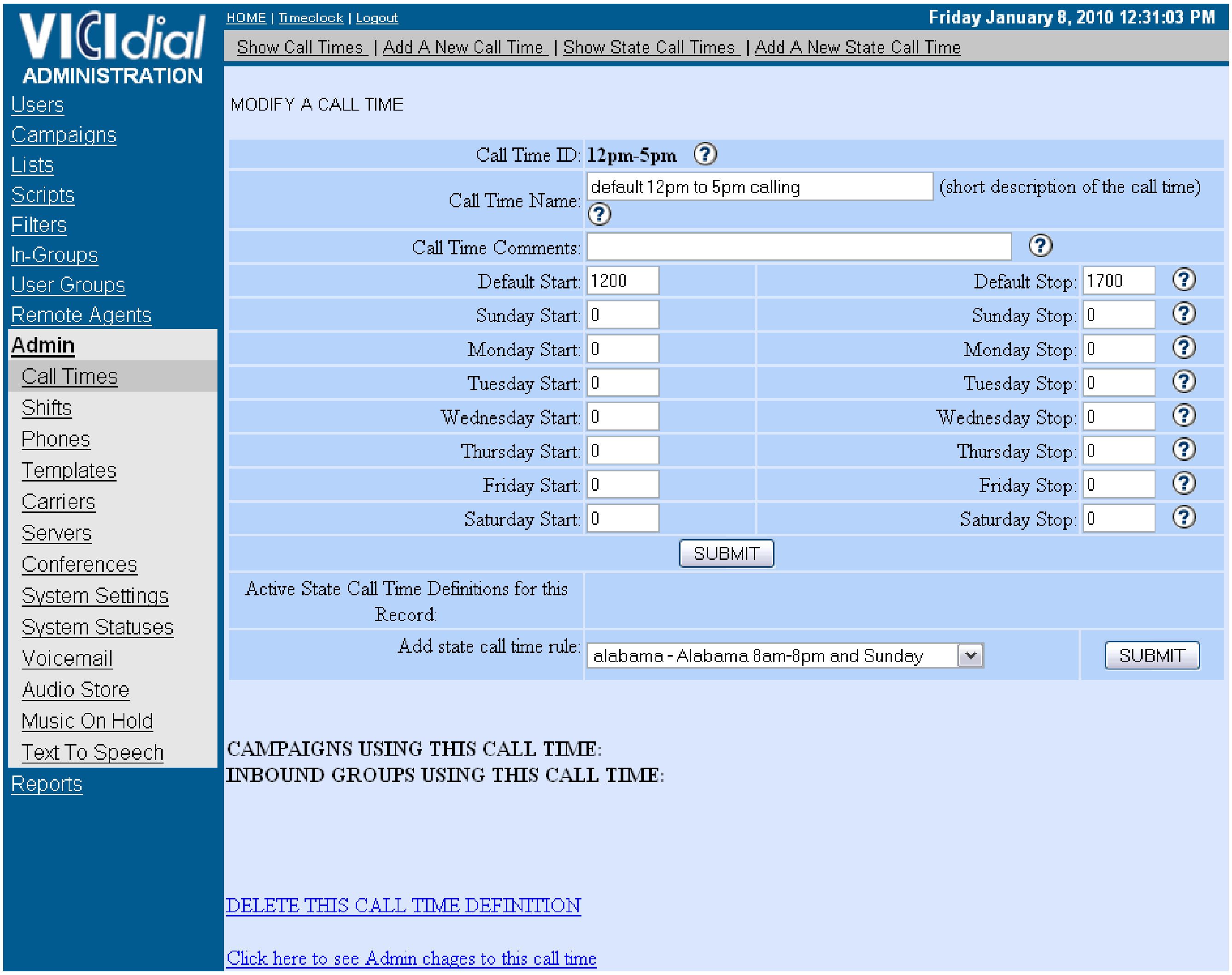


Figure 67. ViciDial Call Time Modification Page

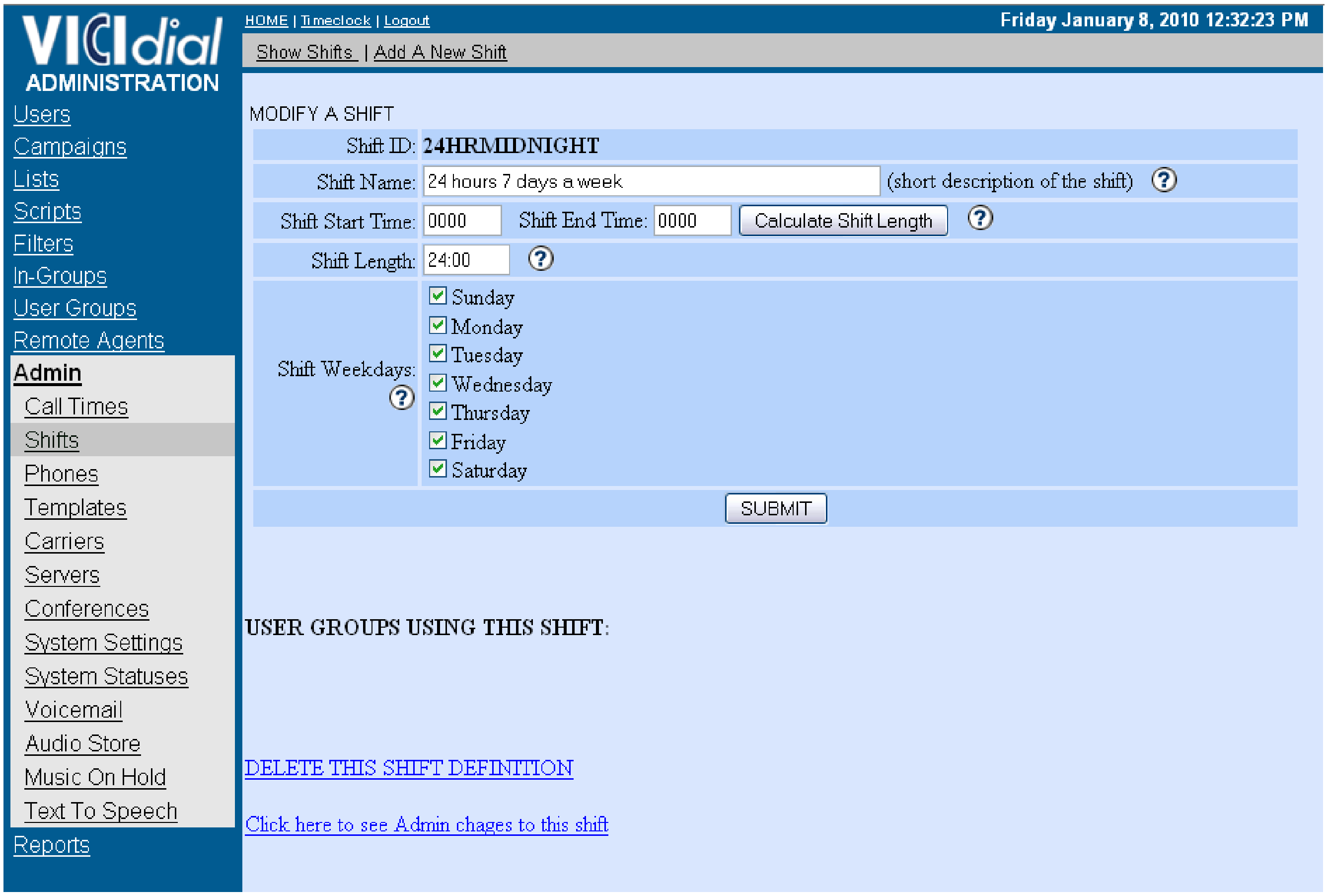


Figure 68. ViciDial Shifts Modification Page

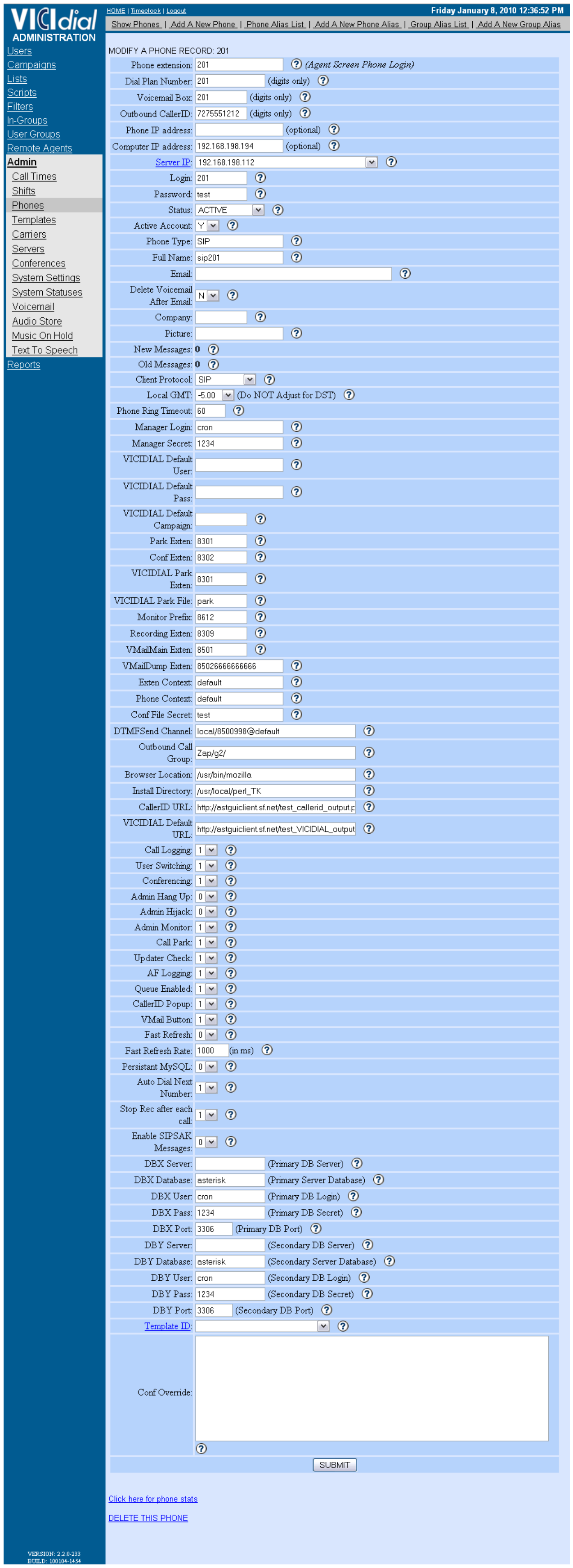


Figure 69. Phone Modification Page

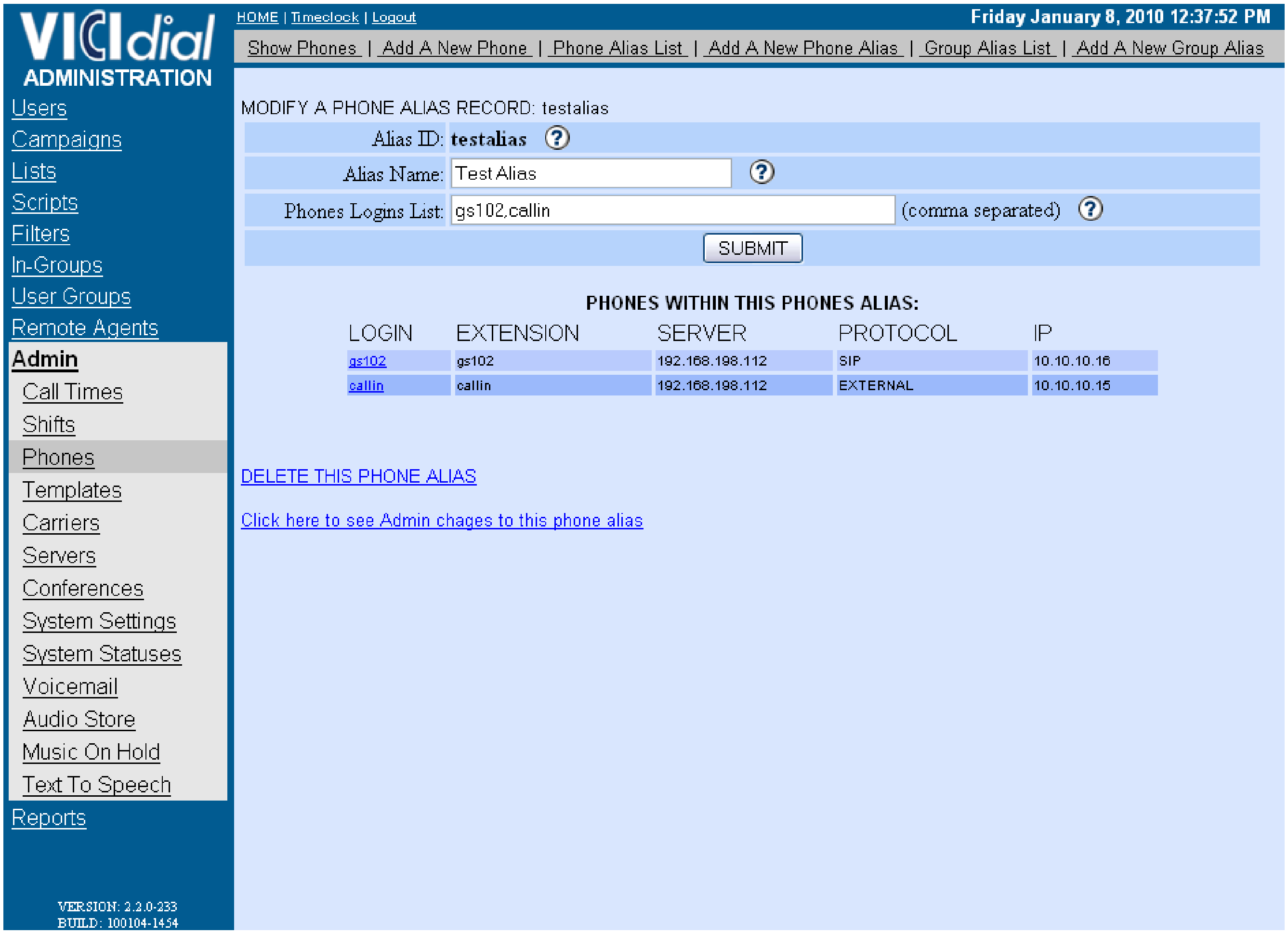


Figure 70. Phone Alias Modification Page

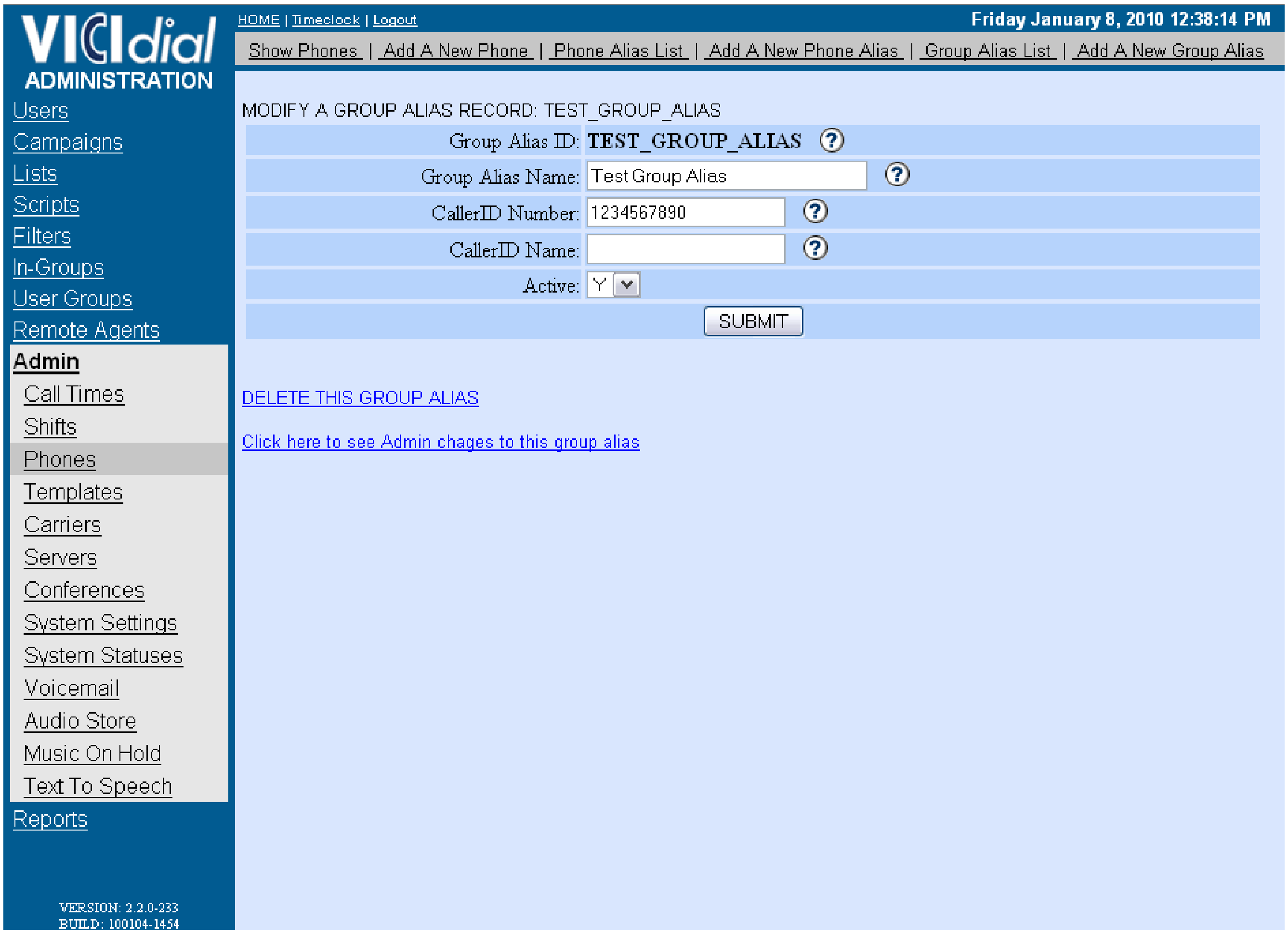


Figure 71. Group Alias Modification Page

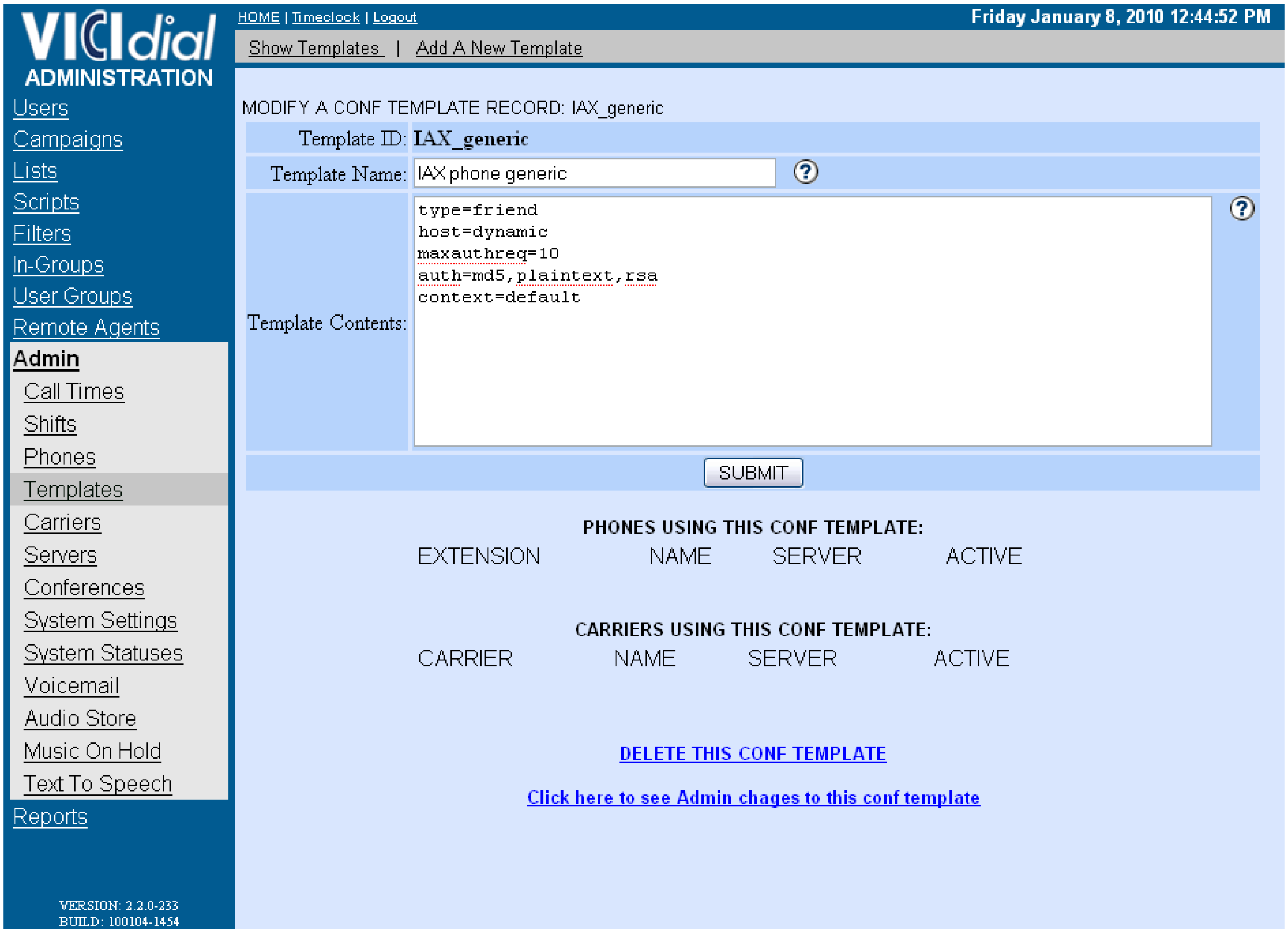


Figure 72. Template Modification Page

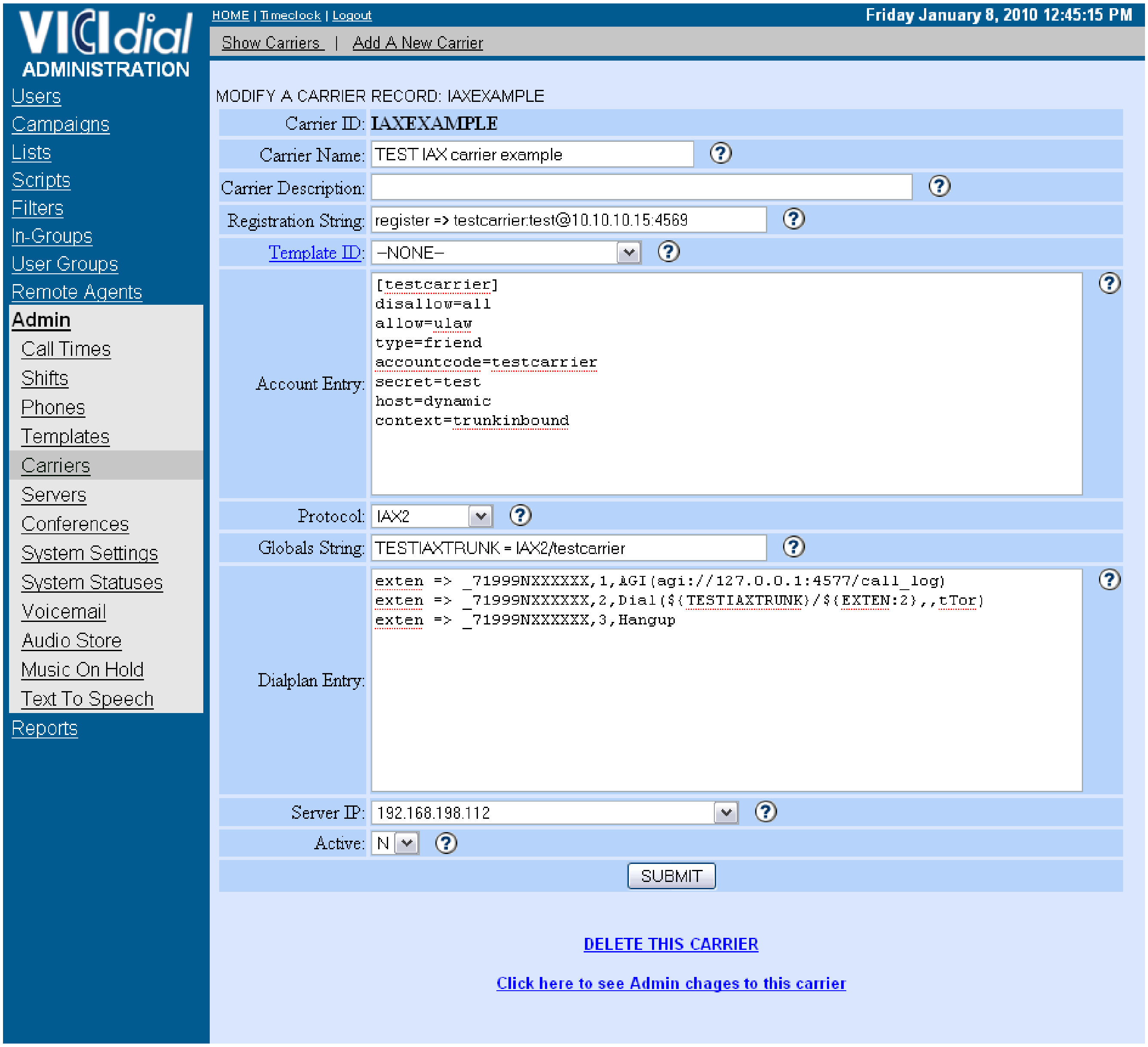


Figure 73. Carrier Modification Page

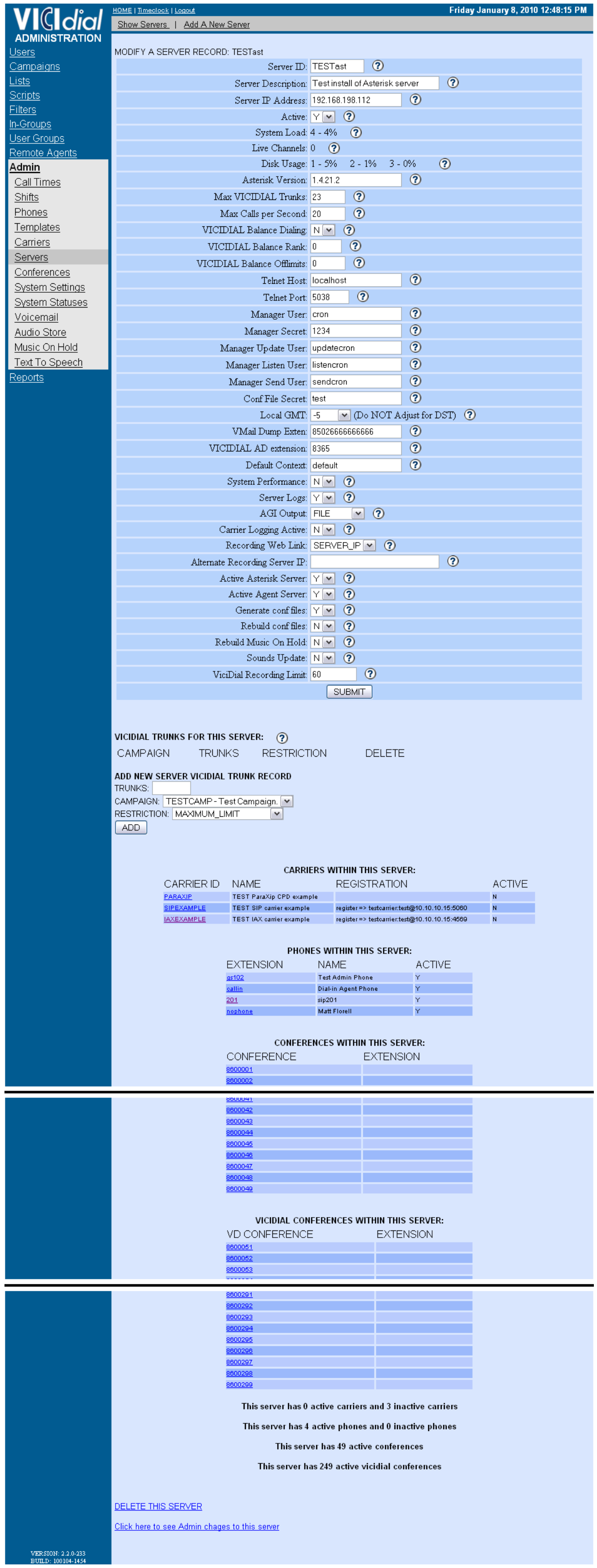


Figure 74. Server Modification Page

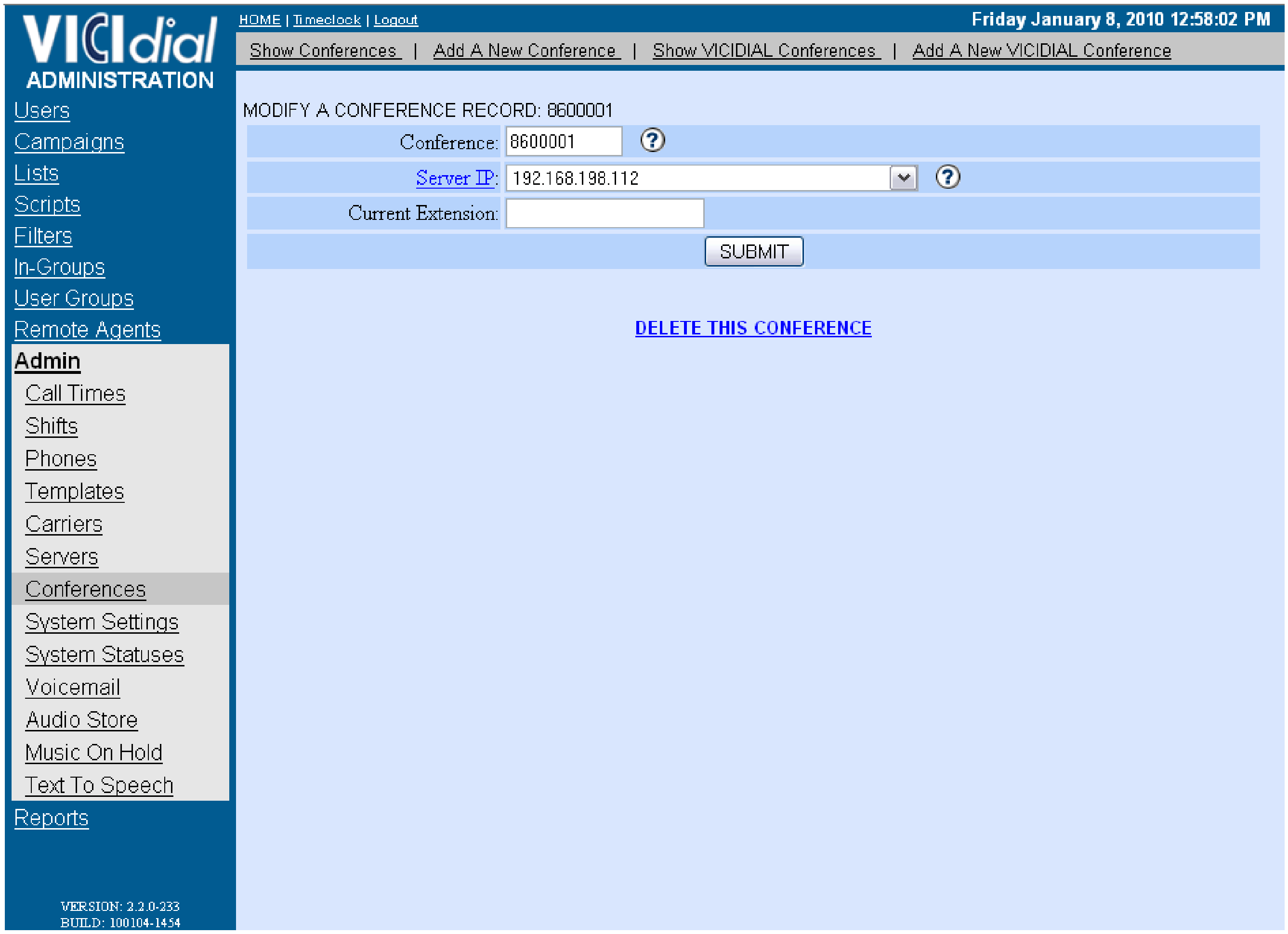


Figure 75. Conference Modification Page

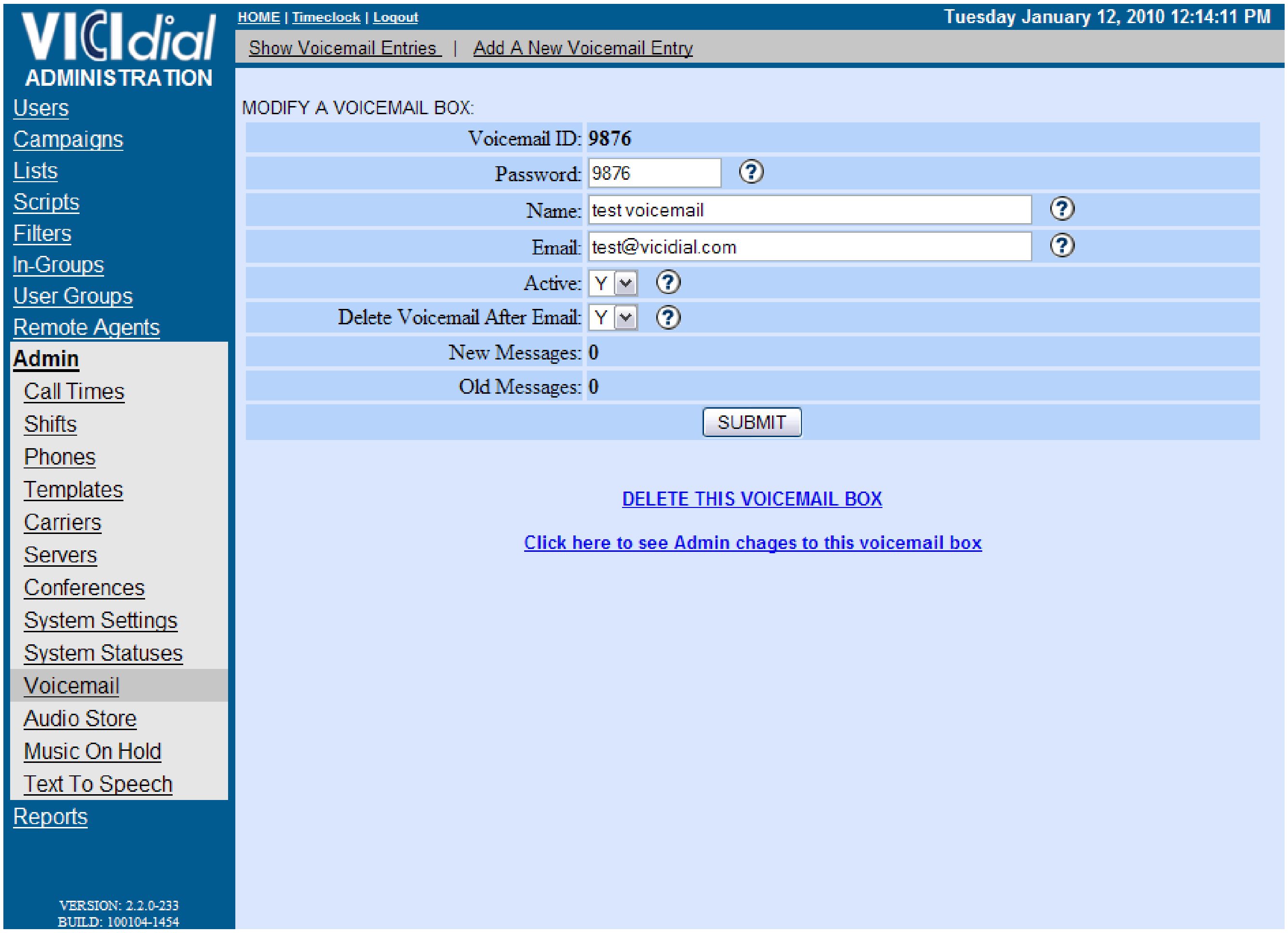


Figure 76. Voicemail Modification Page

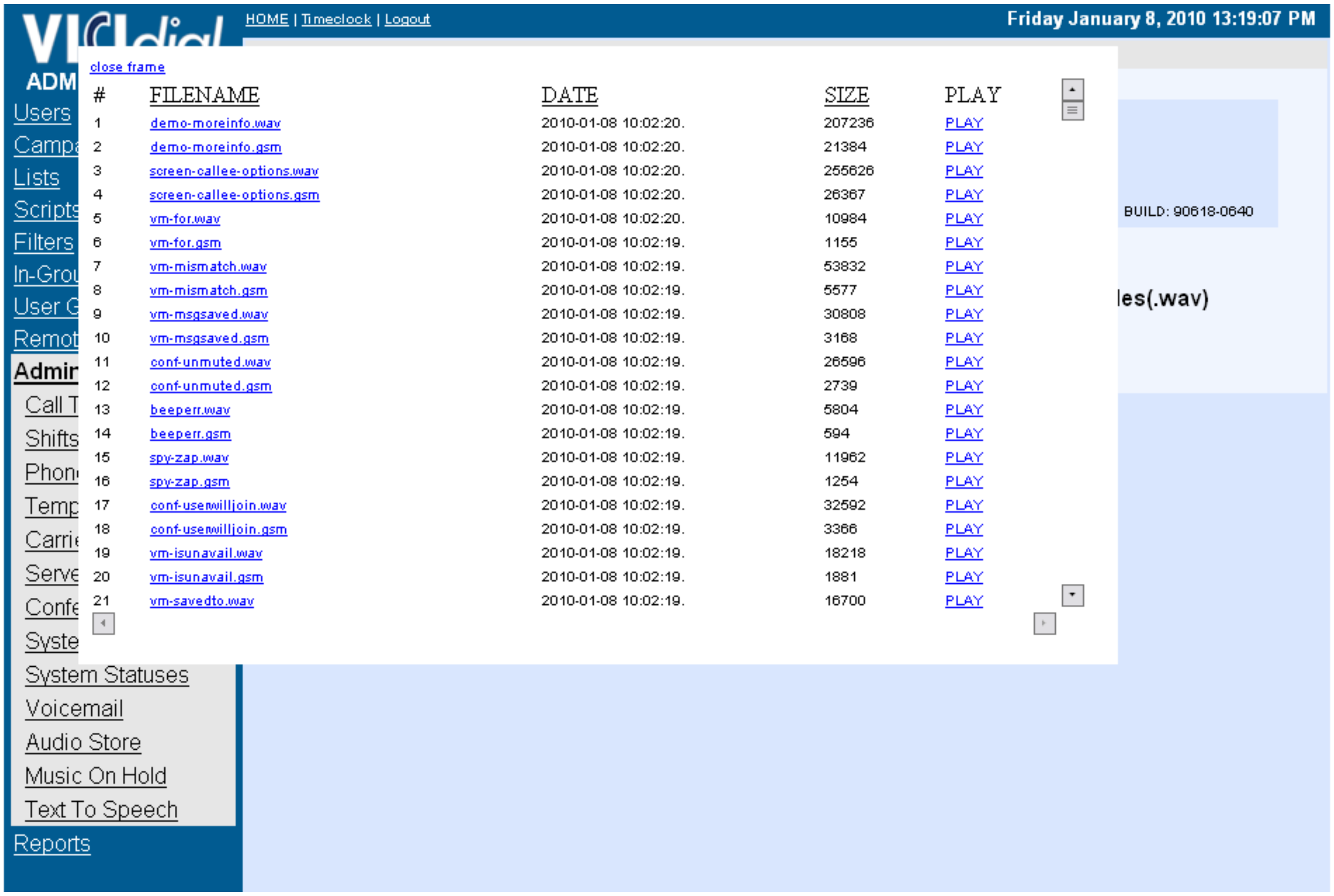


Figure 77. Audio Store List Page

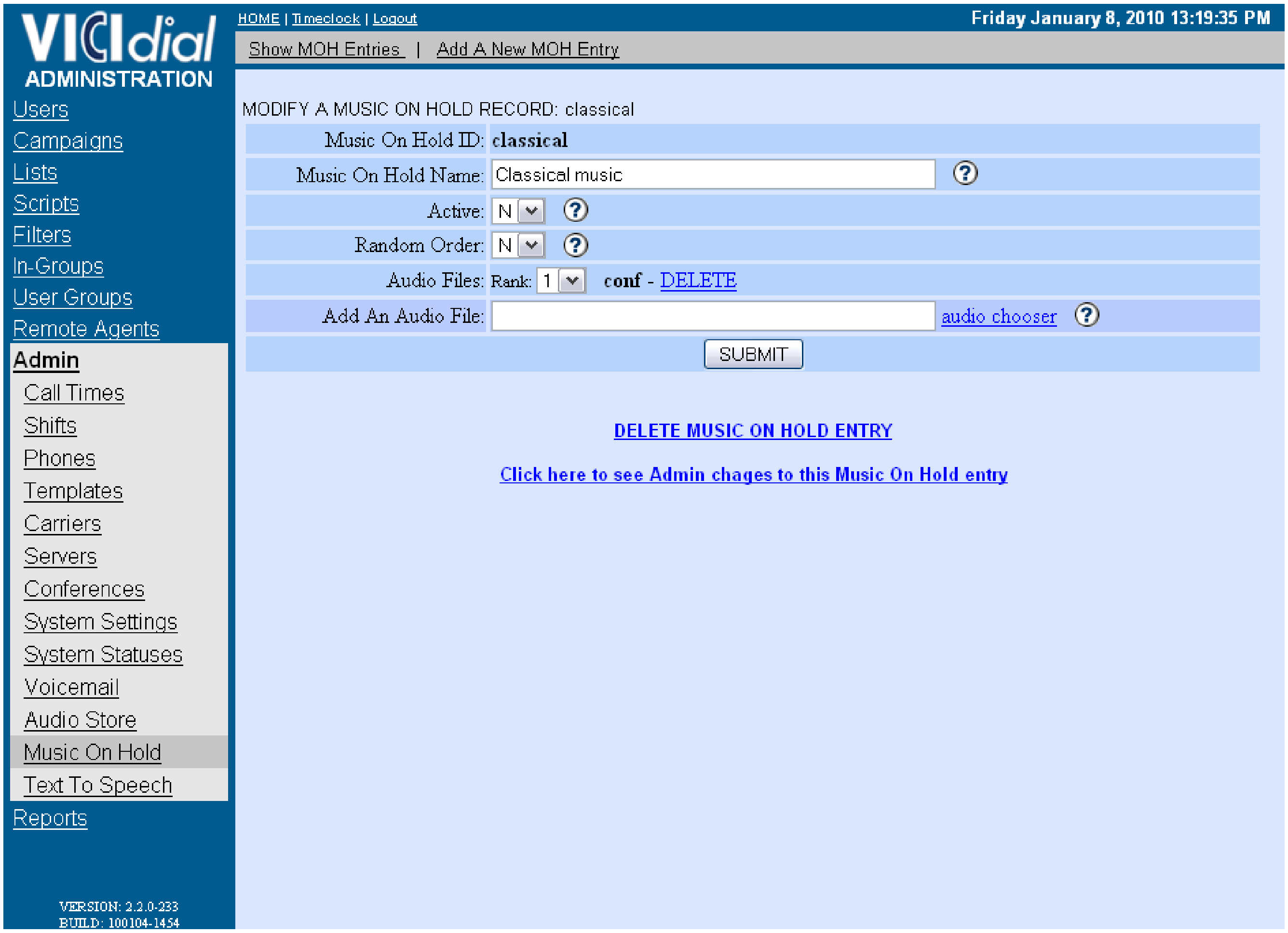


Figure 78. Music On Hold(MOH) Modification Page

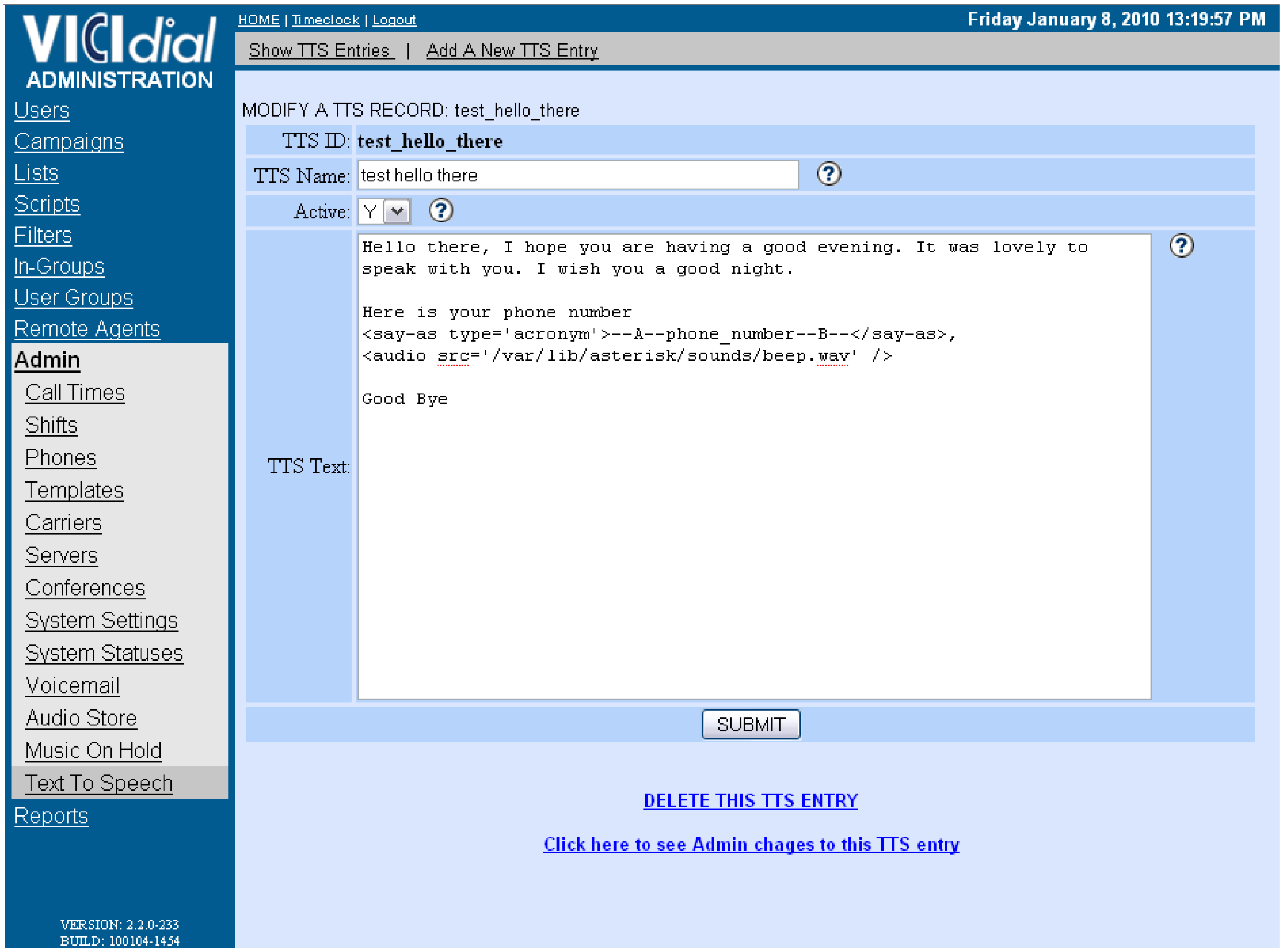


Figure 78. Text To Speech(TTS) Modification Page

Images Listing

