THIS IS THE FREE SAMPLE VERSION OF THE MANAGER MANUAL.

IF YOU WOULD LIKE 256 MORE PAGES OF CONTENT AS WELL AS FULL COLOR SCREENSHOTS, PLEASE GO TO HTTP://WWW.VICIDIAL.ORG TO PURCHASE THE FULL VERSION OF THE VICIDIAL MANAGER MANUAL

# SAMPLE

# VICIdial®

# MANAGER MANUAL

**for VICIdial release 2.9**

**By Matt Florell**

2014-06-12 version

©2014 Vicidial Group

**THIS IS THE FREE SAMPLE VERSION OF THE MANAGER MANUAL.**

**IF YOU WOULD LIKE 256 MORE PAGES OF CONTENT AS WELL AS FULL COLOR SCREENSHOTS, PLEASE GO TO** HTTP://WWW.VICIDIAL.ORG **TO PURCHASE THE FULL VERSION OF THE VICIDIAL MANAGER MANUAL AND TO HELP SUPPORT THE PROJECT**

Special thanks to:

Matt Florell (the creator of VICIdial)
Jon Dratch (edited/updated the manuals)
Stacey Dratch (graphics)

And everyone else who has helped with
the manuals in one way or another:

James Pearson, Michael Cargile,
Kay Steward, Keith Hughes,
Robert Reeder, Matthew Borchert
and Joe Johnson

Copyright ©2014 by the Vicidial Group

All rights reserved. Published by the Vicidial Group.
VICIDIAL and the Vicidial logo are Trademarks and/or Registered Trademarks of the Vicidial Group.

Aside from a single copy of the originally purchased electronic PDF file, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means electronic, mechanical, photocopying, recording or otherwise without the prior permission of the publisher. For information regarding permissions contact the Vicidial Group by email at: info@vicidial.com

First edition of the 2.9 Vicidial Manager Manual, June 2014

The VICIdial project is sponsored by VICIhost.com, hosted VICIdial Contact Center Services

VICIhost.com
Hosted Contact Center Solution

http://www.vicihost.com

# INTRODUCTION

This manual is meant as a resource for Contact 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 2.9rc1 release of VICIdial/astGUIclient.

## *What is VICIdial?*

VICIdial is a Contact Center solution that allows agents to log into a web-based agent screen and take inbound and outbound calls as well as place outbound calls manually and from a list and handle inbound emails in a queue. The agent logs into one campaign and can also take calls or emails 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 thousands 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 contact center. A manager can look at performance reports, modify individual customer lead information, listen in on agent phone calls and do many other functions that are needed to run a contact center effectively.

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

The VICIdial manager administration page(/vicidial/admin.php) gives links to modify and monitor 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 2.9), 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 Contact Center Suite. The section following the Tutorials will give a basic overview of Outbound dialing regulations in the USA(United States of America), UK(United Kingdom) and Canada, including USA Federal government FTC regulations and various state regulations. The section following the regulations section will go into detail about how most of the manager features work with a description of every screen in the manager sections of the VICIdial management interface.

## *What is new in version 2.9?*

In this latest version of VICIdial here is a list of just a few of the new features we have added since the last manual release(2.4):

- Added outbound state call time holidays functionality. Only works if the "state" field is populated properly in your leads.

- Added several security changes to the agent interface, including freezing a user's account for 15 minutes after 10 failed login attempts.

- Changing all of the admin scripts from using the PHP ereg functions to preg.

- Added 4 new reports to the admin interface: url log, lagged log, user group login and dial log reports

- Added new AST_phone_update.pl --agent-lookup flag to allow for logging of the IP address of the agent's SIP or IAX phone connection.

- Added optional encrypted passwords capability within the system.

- Added Reset Lead-Called-Status for Campaigns page to Admin Utilities

- Added System Summary screen as default admin.php screen instead of User List

- Added new agent_monitor.agi script to replace the agi-phone_monitor script for agent monitoring.

- Added the ability for an agent to place manual dial calls out as if they were in-group inbound calls.

- Added Dial In-Group Caller ID override to In-Groups Modify screen, allowing for the callerid to automatically be set per in-group on agent manual dial in-group calls.

- Added transfer call to answering machine message with hotkey option, currently hard-coded to these two statuses: (LTMG or XFTAMM)

- Added User Group Login Report

- Added Safe Harbor Audio Field to campaign options which allows for a lead field to be used as an override safe harbor audio on a per-lead basis

- Added Japanese agent web interface translation with full images

- Added ability to qualify callers before they go through a Call Menu by using a SQL fragment(like in Filters) that you define in a Call Menu.

- Added ability to download the Max System Stats and display by date range.

- Added 'recording' and 'webserver' functions to the agent API

- Added add_group_alias non-agent API function

- Added System Settings option to disable list counts in admin web screens

- Added callback user transfer page, linked from Admin Utilities in Reports

- Added non-loading webphone options and API agent call and webphone url functions

- Added outbound call logging in vicidial_dial_log table

- Added user_group_status and in_group_status functions to the non-agent API.

- Added update_log_entry function to the non-agent API, which allows the updating of the status of an inbound or outbound call log entry.

- Added ability to set an audio store file for the voicemail greeting message

- Added ability to delete audio files from the audio store

- Added logging of svn version info in the database at server install/update

- Added more validation of agent sessions to prevent double-logins

- Added campaign option to show a "Pause After Next Call" link to the agent screen below the Pause/Resume buttons

- Added campaign option to set owner field to user if the owner field is empty

- Added Lead Tools web page from Admin Utilities. Allows for some basic lead management through the web interface.

- Added recording filename variable INGROUP for the In-Group ID of a call

- Added QC functionality contributed by PoundTeam and Affinity On-Call.

- Added QM Socket-Send functionality for custom queue_log record sending.

- Added inbound call time holiday functions.

- Added list expiration date feature

- Added Other Campaign DNC List campaign option

- Added Enhanced Disconnect logging for outside the USA, disabled by default

- Added a campaign feature to allow an agent to search for a lead while on an inbound call and have their active lead change to a search result lead that they select.

- Added inbound email to queue to agent features.

- Added Asterisk 1.8 support. This is in the BETA testing phase currently, and is not recommended for use in production at this time.

- Added campaign options to send answering machine detected calls to a Call Menu or In-Group.

- Added System Settings option to disable Add/Copy admin functions for level 8 users.

- Added ability to use .agi scripts in Call Menu prompt. Also added cm_date.agi script to say date with options

- Converted ereg to preg in the agc agent interface PHP scripts

- Added agi-phone_monitor.agi script to allow monitoring of agents using only their user IDs or phone extensions and no web browser needed.

- Added user_group as a script, form, webform, start_call_url and dispo_call_url variable.

- Added agent_status function to the non-agent API

- Added method for logging SIP error codes, also display of those codes in the agent screen.

- Added admin report logging to all reports on the system, and added the "Admin Report Log Viewer" linked from the "Admin Utilities" page which allows you to see the reports that have been run on the system.

- Added option to the AST_DB_dead_cb_purge.pl script to remove duplicate callback entries for a single lead, keeping the newest one only.

- Added NANPA area code and prefix phone number validation and timezone setting options to the admin web lead loader, the Non-Agent API and the CLI lead loader.

- Added a NOINT flag option to the Call Menu Prompt so the playback cannot be interrupted with a key press by the caller, the NOINT should be put directly in front of the prompt filename, but should not be a part of the filename, it is a special flag for the system.

- Added Survey No Response DROP option to send no-response calls to the campaign drop method and added Survey Wait Seconds to allow you to set the amount of time the person called will have to respond after the survey message is played.

- Added AST_timecheck.pl script to check for Asterisk update sync issues. Also added red indicator on Reports page servers table if server falls out of sync.

- Updated and cleaned up other language builds for agent and admin.

- Asterisk 1.8 now supported in VICIdial

- Updated webdial plugin to work with newer Firefox.

- Added outbound state call time holidays functionality. Only works if the "state" field is populated properly in your leads.

- Added several security changes to the agent interface, including freezing a user's account for 15 minutes after 10 failed login attempts.

- Changing all of the admin scripts from using the PHP ereg functions to preg. This is a requirement for moving to PHP6

where ereg functions are depricated. This will also have the benefit of speeding up those scripts because preg is supposed to be more efficient and faster than ereg.

- Added several security changes to the admin interface, including freezing a user's account for 15 minutes after 10 failed login attempts.

- Added 4 new reports to the admin interface: url log, lagged log, user group login and dial log reports

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

- Added optional encrypted passwords capability within the system. If enabled, all user passwords must be converted to encrypted passwords. To use this you need to have this CPAN module installed on your web servers

- Added Reset Lead-Called-Status for Campaigns page to Admin Utilities

- Added System Summary screen as default admin.php screen instead of User List

- Added new agent_monitor.agi script to replace the agi-phone_monitor script for agent monitoring. Please read the AGENT_MONITOR.txt document for more information on the dialplan changes necessary to use this script.

# 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, now on to the tutorials!

## *A. Initial Welcome Screen and Dialer Setup*

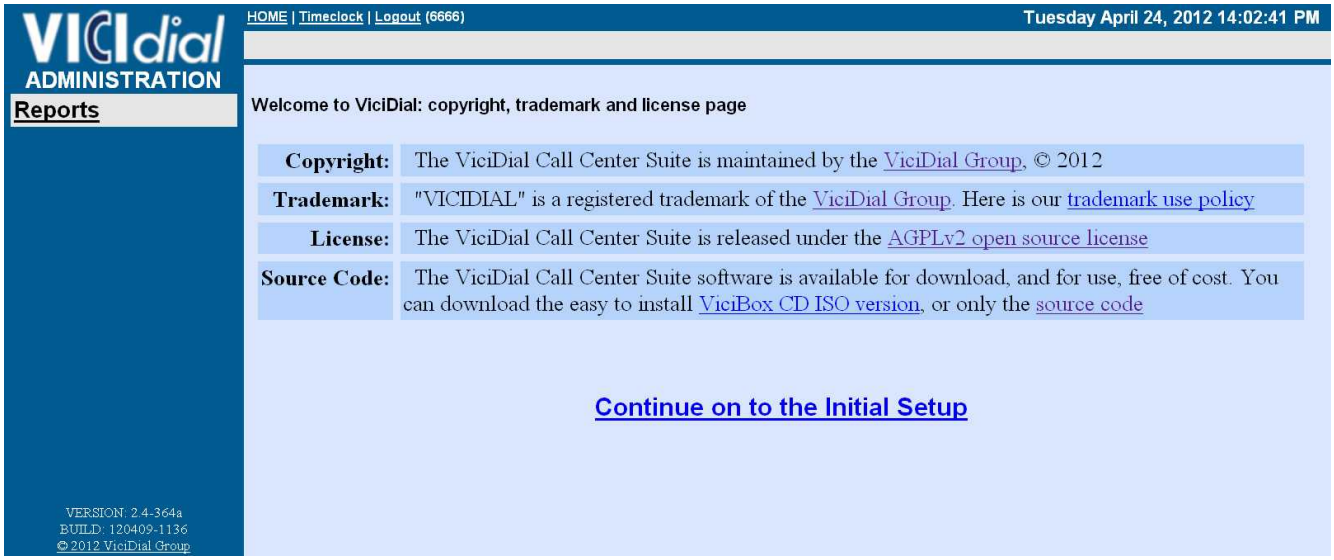


**Figure 1. Initial Dialer Setup and Welcome Screen**

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

Login: 6666
Password: 1234

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

NOTE: VICIdial contains several new security features. New optional password encryption features have been been developed for the agent and admin web interfaces. While not enabled by default, they are fairly easy to activate. For instructions refer to "ENCRYPTED_PASSWORDS.txt" in our document repository at:

*http://vicidial.org/docs/ENCRYPTED_PASSWORDS.txt*

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

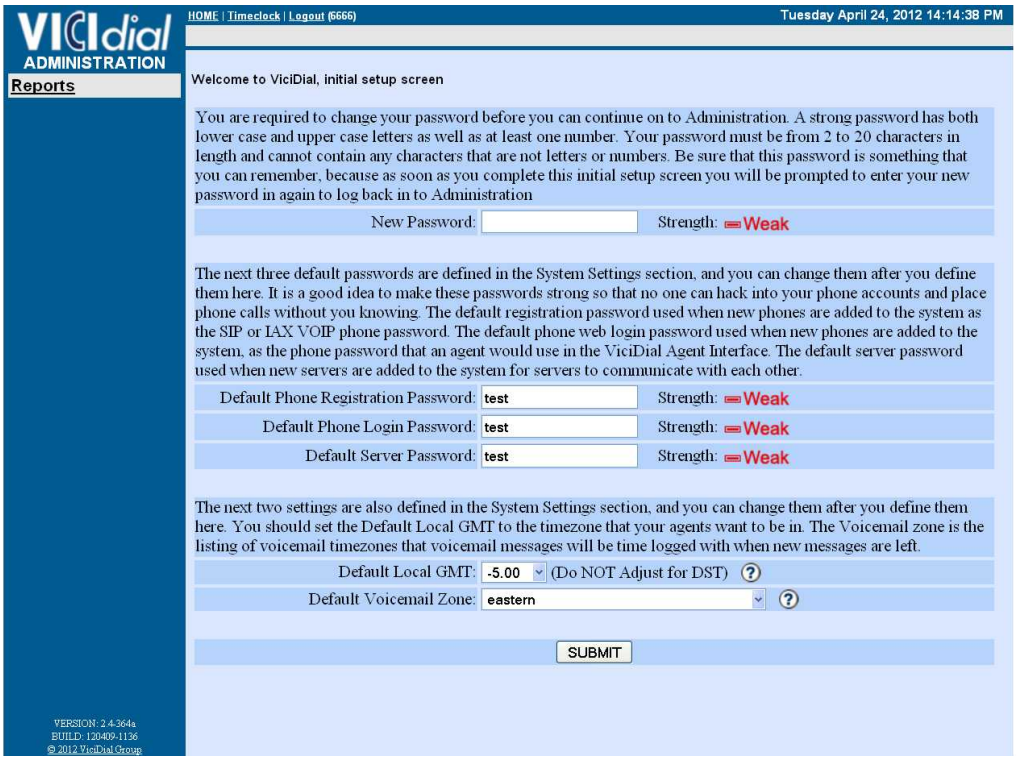


**Figure 2. Initial Dialer Setup Screen**

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

New Password: This fields prompts you to immediately change the password of 1234 for the 6666 user. It should be complex enough to be secure (there is a password strength indicator to provide assistance).

Default Phone Registration Password: This will be the default registration password suggested by the system, each time a Phone is created in the dialer (See tutorial B for more information).

Default Phone Login Password: This will be the default login password suggested by the system, each time a Phone is created in the dialer (See tutorial B for more information).

Default Server Password: This will be the default password suggested by the system, each time a new server is added to your VICIdial cluster.

Default Local GMT: This is the local time, in GMT, from where the server will be located. Please do not adjust for Daylight Savings Time.

Default Voicemail Zone: This will be the default timezone suggested by the system, each time a Phone or general voicemail box is created. This announces to the agents, the local time the message was left. This the Voicemail Zone allows the that time to be accurate, even if the dialer is in a different time zone than the agents.

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

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

For Soft-phones, we usually recommend the IAX soft-phones Zoiper (http://www.zoiper.com) and KIAX (https://sourceforge.net/projects/kiax/) because IAX is a native protocol to 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 (Zoiper can also do SIP as well as IAX). As for hard-phones: Polycom and Snom are recommended, but Linksys/Cisco and Grandstream should also work.

1. Go to the 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)
   agent screen login: 201
   login password: test
   registration password: test
   status: ACTIVE
   active account: Y
   phone type: SIP
   full name: sip201
   <we will leave company and picture fields blank>
   client protocol: SIP
   local gmt: -5 (GMT timezone, you should NOT include adjusting for Daylight Savings Time)
   (0 is the UK, +1 is most of Europe, -5 is EST in the USA, -8 is PST in the USA)
   NOTE: The "Password strength" display next to the password fields will give you a good indication of how secure the password you entered will be. If possible, you should try to use lower case and upper case letters as well as numbers in a password.
   NOTE: for additional security, change "Phone Context" to *phones.* This disables the ability for agents to make calls directly from the phones, they must log into a campaign in the dialer. This also adds another layer of security against hackers that may attempt to register their own phones to your dialer.

3. Click the submit button to create this phone record. After one minute, the phone will be active in the system.
   NOTE: if you are using a phone outside of a local network, we would strongly recommend changing the "Registration Password" field for enhanced security. This field is what you would use as the phone secret or password when you register it on your soft-phone or hard-phone.

4. Go to the Agent's phone and configure the server(or proxy) for the same IP address as you selected above in step 2 for Server-IP, and the login(username) is the Extension as defined above in step 2 and password(secret) is defined as the “Registration Password” field in the Phones entry, then click to “Register” if that option is available, or restart the phone or application.

5. Have the agent log into the VICIdial agent interface script with the phone login(Login) of "201" and phone password(Login Password) of "test".

6. Within a few seconds the agent's phone should ring and they will be logged into VICIdial and can proceed as normal to take calls. If your system uses an embedded web phone, then you will need to click on a link on the screen to log that web-based phone into your session.

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

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

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

NOTE: This only works for SIP or IAX carriers, not standard T1/E1/PRI/POTS telco lines, those require extra hardware and must be configured manually by a systems administrator (see more notes on this at the end of the tutorial). If you are using a Hosted 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)

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

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

Account Entry Notes:
- “disallow=all” clears the preferred codecs list, you then specify the codecs you want to allow, in this instance we have chosen to only allow “ulaw”
- “type=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
```

## *D. 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 loading leads.

5. You now need to create a LIST to import your customer leads to. Click on the ADD A NEW LIST link.

6. For this tutorial we will fill in the following add list fields with these values:
   List ID: 107
   List Name: test list
   Campaign: TESTCAMP
   Active: Y

7. Click submit to create the LIST.

8. To get to the lead loading page, click on the LISTS link at the top of the screen to get to the LISTS section, then click on the LOAD NEW LEADS link to get to the 4th generation lead loader. From here you can import leads in the basic text pipe-delimited or tab-delimited format, a CSV file or a simple Excel spreadsheet. For this tutorial we will use the default tab-delimited text file.
   NOTES: For the web-based lead loader, a tab-delimited or pipe delimited text file must end with ".txt", a CSV(Comma Separated Values) file must end with ".csv" and an Excel file must end with either ".xls" or "xlsx". If you are loading a lead file that has commas in the fields, or you are having issues loading a CSV file, then you should try formatting the file as a Tab-delimited .txt file.

9. The standard format of this lead file is:

```
1. Vendor Lead Code - shows up in the Vendor ID field of the GUI
2. Source Code - internal use only for system and database administrators
3. List ID - the list number that these leads will show up under
4. Phone Code - the country code prefix - 1 for US, 44 for UK, 61 for AUS,etc
5. Phone Number - at least 7 digits long and no more than 16 digits long.
6. Title - title of the customer - Mr. Ms. Mrs, etc...
7. First Name
8. Middle Initial
9. Last Name
10. Address Line 1
11. Address Line 2
12. Address Line 3
13. City
14. State - limited to 2 characters
15. Province
16. Postal Code
17. Country
18. Gender
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
```

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

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

11. The “List ID Override” pulldown indicates which if the existing lists you will be import the leads onto.

12. For dialing in the USA and Canada this field should be set to 1. The phone_code field is required for VICIdial to work properly.

13. 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.

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

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

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

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

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

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

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

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

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

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

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

22. Now that you have successfully created an agent user group, you need to create some 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.

23. For this tutorial we will fill in the following add user fields with these values:
    User Number: 7777
    Password: 1234
    Full Name: test agent
    User Level: 1
    User Group: AGENTS
    <we will leave phone login and phone password blank for this tutorial>

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

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

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

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

NOTE: if the phones are always going to be assigned to a specific computer you may want to create a bookmark or shortcut for the agent login screen with a pre-populated phone login. To do this just use "pl" and "pp" for the phone_login and phone_password fields:
VICIdial.php?pl=phone1&pp=test

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

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

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

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

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

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

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

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

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

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

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

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

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

1. Go to the Campaign Detail screen for your TESTCAMP campaign.

2. Change the Dial Method to ADAPT_TAPERED. This will change your Dial Level automatically to a 1.0 and it will never drop below that as long as you are using this Dial Method. Also, you will not be able to change what is in the dial level field manually while you are using an ADAPT_ dial method unless you check the ADAPT OVERRIDE check-box which will allow you to force a change in dial level even if you are in an ADAPT dial method.

3. Leave the "Available Only Tally" field set to "N". You would only want to set this field to "Y" if you were dialing on a campaign with a very long pitch, or if you wanted extra assurances against dropping customer calls. Setting this field to "Y" will make it so that calls are only placed if there is an agent waiting for a call.

4. Set the "Drop Percentage Limit" to "3%". This is the USA FTC limit of allowable dropped calls per 30-day average per campaign for consumer-based campaigns. You can make this higher or lower depending upon your tolerance for dropped calls. (A dropped or abandoned call is a call that is shown as answered by the carrier and was not able to be sent to an agent before the line was hung up)

5. Set the "Maximum Adapt Dial Level" to "3.0". This number can be higher or lower depending upon the number of agents and the available number of outside lines that you have on your 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 agent 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 then get more strict as the shift gets closer to the end of calling.

NOTES REGARDING PREDICTIVE DIALING:

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

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

This Tutorial might 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 caller ID delivery. In the last tutorial you just tested an outbound campaign and now you want to have your company's 800 number point to VICIdial so that you can have Agents answering inbound phone calls while also receiving caller ID information.

1. Find out from your carrier(phone line provider) what they will be sending your calls to you as. Many carriers will only send you the last 4 digits of the number that has been called. You will need this information to setup your system properly. For this tutorial we will use 800-227-7655 as the inbound 800 number and our provider will send us all 10 digits for these inbound calls (i.e. 8002277655). For more information on setting up a carrier within VICIdial, take a look at tutorial C 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 INBOUND 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 INBOUND section, then you can click on the ADD NEW DID link.

7. On the Create DID page you will put the following values in:
DID Extension: 8002277655
DID Description: Inbound 800 number

8. Then you will click submit to create the DID entry and you will see more options which you should modify:
Active: Y
DID Route: IN_GROUP
In-Group ID: SALESLINE (this is the in-group that we created above)
In-Group Call Handle Method: CID
In-Group Agent Search Method: LB
In-Group Phone Code: 1
<we will leave the other fields in their default values>

Here is a short explanation of the options for a couple of the fields in the DID entry page:
In-Group Call Handle Method:

```
- CID -     CID received, add record with phone number
- CIDLOOKUP -     Lookup CID to find record in whole system
- CIDLOOKUPRL -   Restrict lookup to one list
- CIDLOOKUPRC -   Restrict lookup to one campaign's lists
- CLOSER -      Closer calls from 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, go to the CAMPAIGNS section and the ADD A NEW CAMPAIGN link to create a new Inbound/Closer capable campaign.

10. For this tutorial we will use the following for the fields on the NEW CAMPAIGN form:
Campaign ID: TEST_IN
Campaign Name: Closer and inbound campaign
Active: Y
<we will leave park extension, park filename and web form blank for this tutorial>
Allow Closers: Y
Hopper Level: 5
Auto Dial Level: 1
Next Agent Call: oldest call finish
Local Call Time: 24hours
<we will leave voicemail, script and get call launch blank for this tutorial>

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

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

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

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

13. Now that you have your in-group set up, you should have your agent log into the VICIdial client application: http://server-address/vicidial/welcome.php

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

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

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

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.

# REGULATIONS FOR THE USA: FTC, FCC AND STATES

This section contains a brief overview of the technical issues involved in outbound dialing in the USA. We will go over the USA Federal Government's FTC and FCC regulations for outbound telemarketing to consumers and several states additional regulations on business-related calling. It is important to note that several other countries also have regulations for outbound telemarketing, the UK and Canada for instance have rules that are very similar to those of the USA, including maintaining their own DNC lists. If you will be calling a country other than the USA, then you should contact the regulatory authority responsible for regulating telemarketing for more information on any restrictions that may apply to your type of business.

## *FTC REGULATIONS*

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

## FTC Federal Do-Not-Call List

The Federal Do-Not-Call list(DNC list), as of February 2012, has over 209,000,000 phone numbers in it. This is an opt-in list that is free for consumers and is maintained by the FTC. Companies who place outbound calls to solicit sales from consumers must filter their calling lists against the DNC list at least once a month. Penalties for calling customers on this list can result in thousands of dollars in fines for each violation and increased oversight from the FTC. To gain access to the list you need to register with the FTC as a Seller company. The full national DNC list with all area codes in it costs about $14,000 per year as of September, 2006. It is illegal to share a list with another seller company or offer filtering services to other companies. There are also some loopholes or ways around having to filter your lists against the DNC list:
- If your company has a prior business relationship with the consumer (in the last 18 months for purchase or 3 months for simple information inquiry).
- If you are calling on behalf of a non-profit organization or charity with no intention to sell
- If you are calling with a survey or poll without intention to sell
- If you are calling on behalf of a political campaign(but not to solicit donations)

For 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.

 ©2014 Vicidial Group

## 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. There is an optional archiving process for call logs that may take call logs out of the easily searchable log tables, but they are still stored on the system.

## Other FTC Regulations

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

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

Another FTC rule regards local calling time. According to the FTC, no calls can be placed from businesses to consumers from the hours of 9PM to 8AM local time. There are several states that have more restrictive call times than these, and we recommend a more standard 9AM to 9PM call time range. For 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 that went into effect in September of 2009 that outlawed the use of automated dialing without calls going to an agent (including broadcast dialing, robo-calling and press-1 dialing) unless you have the expressed written permission from the person that you are calling. Also, in February of 2012 the FCC (Federal Communications Commission) also came out with similar rules for non-agent auto-dialing.

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

## *SPECIFIC USA STATE REGULATIONS*

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

## Local Calling Times

Several states have different allowable calling times during different days of the week and times of the day. For example, here is a listing of the state-specific call times that are built-in to 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 Louisiana
- **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, Louisiana
- **Election Day** - November 7(always a Tuesday), Louisiana/Rhode Island
- **Veterans Day** - November 10, Alabama/Louisiana/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.

 ©2014 Vicidial Group

## 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.

## *FCC Regulations*

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

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

## *The TCPA, Cellphone Calling and Filtering*

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

The TPCA defines an ATDS as follows:

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

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

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

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

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

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

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

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

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

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

be levied against the offender.

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

# 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 Contact Center management. This manual will not go into great detail about the Systems Administration side of the Asterisk server or configuration files on the server, only what a manager needs to go through on a day-to-day basis.

 ©2014 Vicidial Group

**Figure 3. 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 user ID, name, user level, group and links to user stats and modification pages (to see all users just click on the “show all users” link near the top). You can also click on the USER ID, 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 User ID, full name, password and user group or the submission will not be accepted. Please make sure that the User ID you have chosen does not have any spaces or punctuation, only letters or numbers. This is also a good time to mention that nothing in VICIdial should contain a created “name” or “ID” that starts with “0”. Leading zeroes have been know to cause problems, so we recommend starting with positive integers. Once you create a user, you will not be able to change that user ID unless you delete the user and re-create it again with a different user ID. You cannot have duplicate User IDs in the system, and User IDs must be between 2 and 20 characters in length. If you want to use features like “If you know the extension...” as mentioned in Tutorial P, or you want to use agent dial-in to allow agents to connect to the system, then the User ID must contain only numbers.

## Modify User

*(screen-shot of the Modify User screen available in the Appendix)*
For users in the User Modifications screen there are account settings, agent interface options and administration interface options.

### *Agent Interface Options*

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

### *Admin Interface Options*

For Administration users that are a user level of 8 or 9, the administration options allow you to set what the managers are allowed to do in the administration interface. These 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 20 characters in length, Must be at least 2 characters in length with no spaces or punctuation of any kind. We recommend using only digits for the User ID, especially if you will want your agents to be able to use the dial-in feature.

**Password** - This field is where you put the VICIdial users password. This 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.

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

**Password Encryption** - New password encryption features have been been developed for the agent and admin web interfaces. It prevents the user's password from being displayed in the admin interface. The password must be re-entered any time it is changed. This feature is not enabled in the dialer by default. For instructions refer to "ENCRYPTED_PASSWORDS.txt" in our document repository at:
http://vicidial.org/docs/ENCRYPTED_PASSWORDS.txt

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

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

**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 Agent's View is enabled and who can be viewed. This also allows for some reports to be displayed with only the results from a specific group in them.

**Phone Login** - Here is where you can set a default phone login value for when the user logs into the agent interface. This value will populate the phone_login automatically when the user logs in with their user-pass-campaign in the agent login screen. If you have agents that are always at the same phone you can use this option, otherwise leave it blank.
NOTE: The "user_login_first" option must be enabled on the back-end of the server first, for this feature to work.

**Phone Pass** - Here is where you can set a default phone password value for when the user logs into 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.

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

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

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

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

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

**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.

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

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

**Agent Call Manual** - This allows the agent to be able to manually dial a phone number while in "Pause" Status. If the Phone number exists in the VICIdial records, it will retrieve the customer's information as it places the call. If the phone number is not in the records, VICIdial will create a brand new lead for that

**Agent Call Email** – This currently a non-functional setting.

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

**Agent Alter Customer Data Override** - This option will override the current campaign settings for altering of customer data. NOT_ACTIVE will use whatever setting is present for the campaign. ALLOW_ALTER will always allow for the agent to alter the customer data, no matter what the campaign setting is. Default is NOT_ACTIVE.

**Agent Alter Customer Phone Override** - This option will override the current campaign settings for altering of only the customer phone number. NOT_ACTIVE will use current settings for the campaign. ALLOW_ALTER will always allow for the agent to alter the customer data, no matter what the campaign setting is. Default is NOT_ACTIVE.

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

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

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

**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 agent interface. Default is 0 for NO.

**Preset Contact Search -** If the user is logged into a campaign with this feature set to CONTACTS, it will disable contact searching for only this user. Default is NOT_ACTIVE, which uses the current campaign setting.

**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.

**Campaign Grades -** The Agent Grade sets the probability (from 1 to 10) the waiting agents will receive a call. This only comes into to play when there is more than 1 agent available. If only 1 agent is "ready" they would receive the incoming call regardless of rank.

**Inbound Groups** - This is a user interface option where a manager can select, with a check in the checkbox, the inbound groups they want that user to receive calls from if they have logged into the CLOSER campaign. These groups will show the last set of in-groups selected by the agent. You should

only alter these when an agent is logged out because they are populated while an agent is logged in and any changes you have made while an agent is already logged in will not stay in the system. Also in this section is the ability to give the agent a Grade (just like Campaign Grades above) or Rank for each inbound group. These ranks can be used for preferred call routing when that option is selected in the in-group screen. Also in this section are the WEB VARs for each campaign. These allow each agent to have a different variable string that can be added to the WEB FORM or SCRIPT tab URLs by simply putting --A--web_vars--B-- as you would put any other field.

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

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

**QC User Level -** This defines the agent's Quality Control user level, and dictates the level of functionality for the agent in the QC section:

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

**QC Pass -** allows the agent to indicate that a record has passed the first round of QC after reviewing the record.

**QC Finish -** allows the agent to specify that a record has finished the second round of QC after reviewing the passed record.

**QC Commit -** allows the agent to specify that a record has been committed in QC. At that point, it can no longer be modified by anyone.

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

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

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

**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 interface. Default is 0-not active.

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

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

**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.

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

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

**Delete DIDs -** This option if set to 1 allows the user to remove DID entries in the Ingroups section 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.

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

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

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

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

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

**Modify Statuses -** This options allows users to make changes to the Lead Statuses in "System Statuses" in the Admin section. Default is 0 - not active.

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

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

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

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

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

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

**Agent API Access -** This option allows the user's 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.

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

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

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

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

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

## Delete A User

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

## Copy A User

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

## Search For Users

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

## More User Information

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

## User Time Sheet

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

## User Status

This report will only show you information if the user is actively logged in to the agent interface. From this screen you can emergency log the agent out or log them in or out of the VICIdial Timeclock. This

screen allows you to see the dialer the agent is logged into, their session, Phone extension, current campaign, and ingroups.

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

## User Stats

This page is a collection of the following reports:

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

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

## User Multiple-Day Status Report

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

## User Territories

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

## User Callbacks

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

## 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.

 ©2014 Vicidial Group

**Figure 4. VICIdial Campaigns List**

## *VICIdial CAMPAIGNS*

When you click on the CAMPAIGNS link at the top of the admin 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, administrative User Group, dial method & level, lead order, 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 is only letters or numbers; it should not have any spaces or punctuation (that includes not using dashes "-"), and you cannot use the same ID for a campaign and an in-group. Once you create a campaign, you will not be able to change that campaign ID unless you delete the campaign and re-create it again with a different campaign ID. You cannot have duplicate campaign IDs in the system, and campaign IDs must be between 2 and 8 characters in length.

## Copy A Campaign

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

## Modify Campaigns

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

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

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

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

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

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

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

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

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

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

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

campaign.

**Park 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. In the Admin section, select the "Music on Hold" link. Create a new Music on Hold (or MOH) entry using recordings loaded into your Audio Store. Finally, use the "moh chooser" link next to the Park Extension field to select your creation. You can also leave this field blank.

**Web Form** - This is where you can set the custom web page that will be opened when the user clicks on the WEB FORM button. 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 to Y will make the Allowed Closers section appear at the bottom of the Campaign options screen, upon submit. If set to N, then there will be no options to transfer a call to another agent on the VICIdial system.
Allow

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

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

**Dial Statuses** - This is where you set the statuses that you are wanting to dial on within the lists that are active for the campaign. You can select over 50 statuses to dial on for each campaign if you need. If you want to remove one, simply click the REMOVE link next to that status, if you want to add one, select it from the "Add a Dial Status" 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 Order Randomize** – When enabled, randomizes the order of the leads, after they have been placed in the Dial Hopper. Default is N for disabled.
NOTE, if you have a large number of leads this option may slow down the speed of the hopper loading script.

**List Order Secondary** – This is a secondary lead sort criteria. After the List Order sorts the leads, the List Order Secondary further refines the process. It takes the results of the 1st sort and uses an additional criteria to sub-arrange all leads that were considered "equal". It can arrange then in either numerical (based on the Lead ID) or chronological (based on Last Call Time) order.

**List Mix** - Overrides the Lead Order and Dial Status fields. Will use the List and status parameters for the selected List Mix entry in the List Mix sub section instead. Default is DISABLED. By Default, List Mix is disabled and will not function until your administrator activates List Mix functionality on the server.

**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.

**Call Count Limit -** This enforces a limit on the number of call attempts for the leads dialed in this campaign. A lead may go over this limit slightly if Lead Recycling or Auto-Alt-Dialing is enabled. Default is 0 for no limit.

**Call Count Target** - This field is used to calculate the penetration percentage on the list modification page, and has no effect on leads dialed. Default is 3.

**Minimum Hopper Level** - This is how many leads the system tries to keep in the hopper for this campaign. You should make this slightly greater than the number of leads you go through in 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.

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

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

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

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

**Hopper VLC Dup Check -** Setting this to Y will result in every lead being inserted into the hopper being checked by vendor_lead_code to make sure there are no duplicate leads inserted with the same vendor_lead_code. This is most useful when Auto-Alt-Dialing with MULTI_LEAD. Default is N.

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

**Dial Method** - This field defines how dialing will 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 agents 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 for the dropped percentage, but without imposing hard limits as aggressively as the other two methods. While in predictive dialing mode, The dial level can not be changed manually. The dialer automatically makes adjustments based on your settings. 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** - Sets 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.

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

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

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

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

**Maximum Adapt Dial Level** - This field is where you set the limit to the number of lines you would like dialed per agent while using an adaptive-predictive dial method, not MANUAL or RATIO. This

number can be higher than the Auto Dial Level if your hardware will support it. Value must be a positive number greater than one and can have decimal places. Default is 3.0.

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

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

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

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

**Concurrent Transfers** - This setting is used to define the number of calls that can be sent to agents at the same time. What this means is that if the concurrent transfer setting is set to 5, then the most recent five customer-connected calls can be sent immediately to agents without waiting for the first connected call to be sent to an agent. This feature does not have much of an effect on efficiency when used in a small setup, but when you get up to 100 agents and higher it can have a dramatic effect, especially when you can have 20 customers answering calls within the same second. It is recommended that this setting is left at AUTO. This field is not used by the MANUAL dial method.

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

**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.

**Inbound Queue No Dial** - This feature if set to ENABLED allows you to prevent outbound auto-dialing of this campaign if there are any inbound calls waiting in queue that are part of the allowed inbound groups set in this campaign. Setting this to ALL_SERVERS will change the algorithm to calculate all inbound calls as active calls on this server even if they are on another server which will reduce the chance of placing unnecessary outbound calls if you have calls coming in on another server. 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.
- campaign_grade_random: orders based on the agent's User Grade for the campaign. The higher the agent's User Grade, the higher their probability to receive a call.
- fewest_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- longest_wait_time: orders by the amount of time agent has been actively waiting for a call

**Local Call Time** - This is where you set during which hours you would like to dial, as determined by the local time for the leads you are calling. This is controlled by area code and is adjusted for Daylight Savings time if applicable. General Guidelines in the USA for Business to Business is 9am to 5pm and Business to Consumer calls is 9am to 9pm. To see more information on the Call Time that has been selected just click on the linked "Local Call Time". For more information on call time restrictions, look in the Regulations for the USA section of this manual.

**Dial Timeout** - If defined, calls that would normally hangup after the timeout defined in your dialplan (extensions.conf) would instead timeout at this amount of seconds if it is less than the dialplan timeout. This allows for quickly changing dial timeouts from server to server and limiting the effects to a single campaign. If you are having a lot of Answering Machine or Voice mail calls you may want to try

changing this value to between 19-26 and see if results improve. USA FTC Safe-Harbor regulations require at least 15 seconds of ring time on business to consumer calls( which they consider to be four rings).

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

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

**Omit Phone Code** - This field allows you to leave out the phone_code field while dialing within 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 Caller ID** - This field allows for the sending of a custom caller ID number on the outbound calls. This is the number that would show up on the caller ID 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 caller ID 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 caller ID. The custom caller ID only applies to calls placed for the VICIdial campaign directly, any 3rd party calls or transfers will not send the custom caller ID. NOTE: Sometimes putting UNKNOWN or PRIVATE in the field will yield the sending of your default caller ID number by your carrier with the calls. You may want to test this and put 0000000000 in the caller ID field instead if you do not want to send you caller ID. If your Asterisk server is running Asterisk@Home, Trixbox or FreePBX, you may have issues with sending a caller ID properly, if you run into problems you should contact your system administrator. USA FTC regulations require the sending of a valid caller ID number on outbound business to consumer calls.

**Custom Caller ID -** When set to Y, this option allows you to use the security_phrase field in the VICIdial_list table as the caller ID to send out when placing for each specific lead. If this field has no CID in it then the Campaign Caller ID defined above will be used instead. This option will disable the list Caller ID Override if there is a CID present in the security_phrase field. Default is N. When set to AREACODE you have the ability to go into the AC-CID sub-menu and define multiple caller IDs to be used per area code.

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

- 8364 – same as 8368
- 8365 – Will send the call only to an agent on the same server as the call is on
- 8366 – Used for press-1 and survey campaigns
- 8367 – Will try to first send the call to an agent on the local server, then it will look on other servers
- 8368 – DEFAULT – Will send the call to the next available agent no matter what server they are on
- 8369 – Used for Answering Machine Detection after that, same behavior as 8368

- 8373 – Used for Answering Machine Detection after that same behavior as 8366-
- 8374 - Used for press-1, broadcast and survey campaigns with Cepstral Text-to-speech
- 8375 - Used for Answering Machine Detection then press-1, broadcast and survey campaigns with Cepstral Text-to-speech

**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 extension is 8309 which if you follow the SCRATCH_INSTALL examples will record in the WAV format for up to one hour. Another option included in the examples is 8310 which will record in GSM format for up to one hour. By default, recordings only last for one hour, if you want them to last longer you will need to have your System Administrator set the timeout on recordings to a higher number.

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

**Campaign Rec Filename** - This field allows you to customize the name of the recording when Campaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN INGROUP CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID. 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.

90 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.

**Call Notes Per Call -** Setting this option to ENABLED will allow agents to enter in notes for every call they handle in the agent interface. The notes entry field will appear below the Comments field in the agent interface. Also, if the Agent User Group is allowed to view Call Logs then the agent will be able to view past call notes for a lead at any time. Default is DISABLED

**Agent Lead Search -** Setting this option to ENABLED will allow agents to search for leads and view lead information while paused in the agent interface. Also, if the Agent User Group is allowed to view Call Logs then the agent will be able to view past call notes for any lead that they are viewing information on. LIVE_CALL_INBOUND allows the agent to search for a lead and have their active lead change to a search result lead that they selected (on inbound calls only). LIVE_CALL_INBOUND_AND_MANUAL allows searching for a lead while on an inbound call or while paused. When Lead Search is used on a live inbound call, the initial lead will be changed to a status of LSMERG, and the logs for the call will be modified to link to the agent selected lead instead. Default is DISABLED.

**Agent Lead Search Method -** If Agent Lead Search is enabled, this setting defines where the agent will be allowed to search for leads. SYSTEM will search the entire system, CAMPAIGNLISTS will search inside all of the active lists within the campaign, CAMPLISTS_ALL will search inside all of the active and inactive lists within the campaign, LIST will search only within the Manual Dial List ID as defined in the campaign. Default is CAMPLISTS_ALL. One of these options with USER_ in front will only search within leads that have the owner field matching the user ID of the agent, the options with GROUP_ in front will only search within leads that have the owner field matching the user group that the user is a member of, the options with TERRITORY_ in front will only search within leads that have the owner field matching the territories that the agent has selected.

**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 WEBFORM or WEBFORM2 pages in a separate window, auto-switch to the SCRIPT or FORM (custom fields) tabs, 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 extension up in either the dialplan (extensions.conf), or as a file recording in the Audio Store (selected using the "audio chooser" link). Make sure it plays an audio file then hangs up.

**Wait For Silence Options –** This is used to determine when the customer's outgoing answering machine message has completed, so that VICIdial can correctly time when to leave the desired recorded message. 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 Action** - This option allows you to define whether a call is sent to the AMD Action when an answering machine is detected. If this is set to N, then the call will be hung up as soon as it is determined to be an answering machine. Default is N.

**CPD AMD Action -** If you are using the Sangoma ParaXip Call Progress Detection software then you will want to enable this Feature. Set to either DISPO, which dispositions the call as AA and hang up if the call is being processed and has not been sent to an agent yet. MESSAGE sends the call to the defined Answering Machine Message for this campaign. INGROUP transfers the call to the Ingroup indicated in AMD Inbound Group. While CALLMENU routes the call to the CPD Call Menu. Default is DISABLED.

**AMD Inbound Group** – If CPD AMD Action is set to INGROUP, this indicates the groups calls will be routed to.

**AMD Call Menu –** When CPD AMD Action has CALLMENU selected, this specifies which Call Menu will be used.

**Transfer-Conf Numbers and DTMF** - These seven fields allow for you to have two sets of Transfer-Conference Number and DTMF presets and three additional conference numbers. When the call or campaign is loaded, the agent interface will show two links(D1 through D5) on the transfer-conference frame and auto-populate the number-to-dial and the send-dtmf fields when clicked-on. If you want to allow Blind transfers of customers to a 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.

**Enable Transfer Presets** - This transfer option will enable the Presets sub menu to appear at the top of the Campaign Modification page, where you can specify an almost unlimited list of transfer phone numbers. A "Presets" link appears at the bottom right corner of the agent's screen (in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it pops a window showing all their available preset phone numbers. Selecting the entry from the list places it in the "Number to Call" field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact_information is enabled on your system, that is a custom feature.

**Hide Transfer Number to Dial -** This option will hide the Number to Dial field in the Transfer-Conference frame of the agent interface. Default is DISABLED.

**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.

**Custom 3-Way Button Transfer -** This option adds a Custom Transfer button to the agent screen below the Transfer-Conf button. It allows one click three way calls using the selected preset or field. The PRESET_ options will place calls using the defined preset value. The FIELD_ options will place calls using the number in the selected field from the lead. DISABLED will not show the button on the agent screen. The PARK_ options will park the customer before dialing. The VIEW_PRESET option will simply open the transfer frame and the preset frame. The VIEW_CONTACTS option will open a contacts search window (this only works if Enable Presets is set to CONTACTS). Default setting is DISABLED.

**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.

**Park Call IVR** - This option will allow an agent to park a call with a separate IVR PARK CALL button on their agent interface if this is ENABLED or ENABLED_PARK_ONLY. The ENABLED_PARK_ONLY option will allow the agent to send the call to park but not click to retrieve the call like the ENABLED option. The ENABLED_BUTTON_HIDDEN option allows the function through the API only. Default is DISABLED.

**Park Call IVR AGI -** If the Park Call IVR field is not DISABLED, then this field is used as the AGI application string that the customer is sent to. This is a setting that should be set by your administrator

if possible

**Timer Action -** This feature allows you to trigger actions after a certain amount of time. the D1 through D5 DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE_ONLY will simply display the message that is in the field below. NONE will disable this feature, and is the default setting. HANGUP will hang up the call when the timer is triggered, CALLMENU will send the call to the Call Menu specified in the Timer Action Destination field, EXTENSION will send the call to the Extension that is specified in the Timer Action Destination field, IN_GROUP will send the call to the In-Group specified in the Timer Action Destination field.

**Timer Action Message -** This is the message that appears on the agent screen at the time the Timer Action is triggered.

**Timer Action Seconds -** This is the amount of time after the call is connected to the customer that the Timer Action is triggered. Default is -1 which is also inactive.

**Timer Action Destination** - This field is where you specify the Call Menu, Extension or In-Group that you want the call sent to if the Time Action is set to CALLMENU, EXTENSION or IN_GROUP. Default is empty.

**CPD AMD Action** - If you are using the Sangoma ParaXip Netborder Call Progress Detection software then you will want to enable this setting. You can either select 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 Number 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 and autodial modes.

**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.

**Scheduled Callbacks Alert -** This option allows the callbacks status line in the agent interface to be red, blink or blink red when there are AGENTONLY scheduled callbacks that have hit their trigger time and date. Default is NONE for standard status line. The DEFER options will stop blinking and-or displaying in red when you check the callbacks, until the number of callbacks changes. An option can be added to the AST_DB_dead_cb_purge.pl script to remove duplicate callback entries for a single lead, keeping the newest one only (contact your administrator to set this up).

**Scheduled Callbacks Count -** This option allows you to limit the viewable callbacks in the agent callback alert section on the agent screen, to only LIVE callbacks. LIVE callbacks are user-only scheduled callbacks that have hit their trigger date and time. ACTIVE call backs are user-only

callbacks that are active in the system but have not yet triggered. You can view both ACTIVE and LIVE callbacks by selecting ALL_ACTIVE. Default is ALL_ACTIVE.

**Scheduled Callbacks Days Limit -** This option allows you to reduce the agent scheduled callbacks calendar to a selectable number of days from today, the full 12 month calendar will still be displayed, but only the set number of days will be selectable. Default is 0 for unlimited.

**Scheduled Callbacks Hours Block -** This option allows you to restrict a USERONLY scheduled callback from being displayed on the agent callback list until X hours after it has been set. Default is 0 for no block.

**Scheduled Callbacks Calltime Block -** This option if enabled will prevent the scheduled callback in the agent callback list from being dialed if it is outside of the scheduled calltime for the campaign. Default is DISABLED.

**My Callbacks Checkbox Default -** This option allows you to pre-set the My Callback checkbox on the agent scheduled callback screen. CHECKED will check the checkbox automatically for every call. Default is UNCHECKED.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the call is considered a DROP, only applies to outbound calls. To comply with the USA FTC Safe-Harbor regulations for business to consumer calls we recommend that you set this to 5 seconds at most.

**Drop Call Action** - This menu allows you to choose what happens to a call when it has been waiting for longer than what is set in the Drop Call Seconds field. HANGUP will simply hang up the call, AUDIO plays the Safe Harbor audio file, MESSAGE will send the call the Drop Exten that you have defined below, VOICEMAIL will send the call to the voicemail box indicated below, CALLMENU will send the call to the Call Menu defined below, and IN_GROUP will send the call to the Inbound Group that is defined below.

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

**Safe Harbor Audio -** This is the audio prompt file that is played if the Drop Action is set to AUDIO. Default is buzz.

**Safe Harbor Audio Field -** defines a field in the list that the system will use as the audio filename for each lead in place of the Safe Harbor Audio file. If this is set to DISABLED the Safe Harbor Audio file will always be used. The system will do no validation to make sure that the audio file exists other than to make sure the value of the field is at least one character, so to have the lead to use the default Safe harbor Audio, simply set the field value in the lead to empty. The pipe character can be used to link multiple audio files together in the field value for each lead. Default is DISABLED. Here is the list of fields that can be used for this setting: *vendor_lead_code, source_id, list_id, phone_code, phone_number, title, first_name, middle_initial, last_name, address1, address2, address3, city, state, province, postal_code, country_code, gender, alt_phone, email, security_phrase, comments, rank, owner, entry_list_id*

**Safe Harbor Call Menu -** This is the call menu that a call is sent to if the Drop Action is set to

CALLMENU.

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

**Drop Transfer Group** - If Drop Action is set to IN_GROUP, the call will be sent to this inbound group if it reaches Drop Call Seconds.

**Disable Dispo Screen** - This option allows you to disable the disposition screen in the agent interface. The Disable Dispo Status field below must be filled in for this option to work. Default is DISPO_ENABLED. The DISPO_SELECT_DISABLED option will not disable the dispo screen completely, but will display the dispo screen without any dispositions, this option should only be used if you want to force your agents to use your CRM software which will send the status to the system through the API.

**Disable Dispo Status -** If the Disable Dispo Screen option is set to DISPO_DISABLED, then this field must be filled in. You can use any disposition you want for this field as long as it is 1 to 6 characters in length with only letters and numbers.

**Wrapup Seconds** - The number of seconds to force an agent to wait before allowing them to receive or dial another call. The timer begins as soon as an agent hangs up on their customer - or in the case of alternate number dialing when the agent finishes the lead - Default is 0 seconds. If the timer runs out before the agent has dispositioned the call, the agent still will NOT move on to the next call until they select a disposition. There is also a link on the Wrapup screen for the agent to be able to override the wrapup timer and move on to the next call.

**Wrapup Message** - This is a campaign-specific message to be displayed on the wrapup screen if wrapup seconds is set.

**Use Internal DNC List** - This defines whether this campaign is to filter leads against the Internal DNC list, and insert leads into the DNC list if they are dispositioned as DNC by an agent in this campaign. If it is set to Y, the hopper will look for each phone number in the DNC list before placing it in the hopper. If it is in the DNC list then it will change that lead status to DNCL so it cannot be dialed. Default is N.

**Use Campaign DNC List** - This defines whether this campaign is to filter leads against the DNC list that exists only for this campaign, and insert leads into the campaign-specific DNC list if they are dispositioned as DNC by an agent in this campaign. If it is set to Y, the hopper will look for each phone number in the campaign-specific DNC list before placing it in the hopper. If it is in the campaign-specific DNC list then it will change that lead status to DNCC so it cannot be dialed. Default is N.

**Other Campaign DNC -** If the option Use Campaign DNC List is enabled, it can allow you to use a different campaign DNC list. Enter the Campaign ID of the other campaign in this field. If this options is used, the original campaign DNC list will not be checked. Only the OTHER campaign DNC list will be used. This does not affect use of the Internal System DNC list. Default is EMPTY.

**Agent Pause Codes Active** - Allows agents to select a pause code when they click on the PAUSE button in VICIdial agent interface. 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.

**Auto Pause Pre-Call Work** - In auto-dial mode, when enabled this setting, will set the agent to paused automatically when the agent clicks on any of the following functions that requires them to be paused- Manual Dial, Fast Dial, Lead Search, Call Log View, Callbacks Check, Enter Pause Code. Default is N for inactive.

**Auto Resume Pre-Call Work -** In auto-dial mode, this setting if enabled will set the agent to active automatically when the agent clicks out of, or cancels, on any of the following functions that requires them to be paused- Manual Dial, Fast Dial, Lead Search, Call Log View, Callbacks Check, Enter Pause Code. Default is N for inactive.

**Auto Pause Pre-Call Code -** If the Auto Pause Pre-Call Work function above is active, and Agent Pause Codes is active, this setting will be the pause code that is used when the agent is paused for these activities. Default is PRECAL.

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

**Real-Time Agent Time Stats -** Setting this to anything but DISABLED will enable the gathering of agent time stats for today for this campaign, viewable through the Real-Time report. CALLS are the average calls handled per agent, WAIT is the average agent wait time, CUST is the average customer talk time, ACW is the average After Call Work time, PAUSE is the average pause time. Default is DISABLED.

**Disable Alter Customer Data** - If set to Y, does not change any of the customer data record when an agent dispositions the call even if they have altered customer information. Default is N.

**Disable Alter Customer Phone Number** - If set to Y, The customer phone number will be displayed on the agent screen, but they can not edit it. Default is N.

**Allow No-Hopper-Leads Logins** - If set to Y, allows agents to login to the campaign even if there are no leads loaded into the hopper for that campaign. This function is not needed in CLOSER-type campaigns. Default is N.

**No Hopper Dialing -** If This is enabled, the hopper will not run for this campaign. This option is only available when the dial method is set to MANUAL or INBOUND_MAN. It is recommended that you do not enable this option if you have a very large lead database, over 100,000 leads. With No Hopper Dialing, the following features do not work: lead recycling, auto-alt-dialing, list mix, list ordering with Xth NEW. If you want to use Owner Only Dialing you must have No Hopper Dialing enabled. Default is N for disabled.

**Owner Only Dialing -** If This is enabled, the agent will only receive leads that they are within the ownership parameters for. If this is set to USER then the agent must be the user defined in the database as the owner of this lead. If this is set to TERRITORY then the owner of the lead must match the territory listed in the User Modification screen for this agent. If this is set to USER_GROUP then the

owner of the lead must match the user group that the agent is a member of. For this feature to work, the dial method must be set to MANUAL or INBOUND_MAN and No Hopper Dialing must be enabled. If the option has BLANK at the end, then users are allowed to dial leads with no owner defined, in addition to owner defined leads. Default is NONE for disabled.

**Owner Populate -** If this is enabled and the owner field of the lead is blank, the lead's owner field will populate with the user ID of the agent that handles the call first. Default is DISABLED.

**Agent Select Territories -** If this option is enabled and the agent belongs to at least one territory, the agent will have the option of selecting territories to dial leads from. The agent will see a list of available territories upon login and they will have the ability to go back to that territory list when paused to change their territories. For this function to work the Owner Only Dialing option must be set to TERRITORY and User Territories must be enabled in the System Settings.

**Agent Display Dialable Leads** - This option if enabled will show the number of dialable leads available in the campaign in the agent screen. This number is updated in the system once a minute and will be refreshed on the agent screen every few seconds.

**Agent Screen Labels -** You can select a set of agent screen labels to use with this option. Default is --SYSTEM-SETTINGS-- for the default labels. Additional labels can be created in the Admin section, by selecting the "Screen Labels" link.

**Status Display Fields -** You can select which variables for calls will be displayed in the status line of the agent screen. CALLID will display the 20 character unique call ID, LEADID will display the system lead ID, LISTID will display the list ID. Default is CALLID.

**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.

**Agent Pause After Next Call Link** – When enabled, this displays a link on the agent screen that will

allow them go on pause automatically after they hang up their next call.  Default is DISABLED.

**Manual Dial Override -** The setting can override the Users setting for manual dial ability for agents when they are logged into this campaign. NONE will follow the Users setting, ALLOW_ALL will allow any agent logged into this campaign to place manual dial calls, DISABLE_ALL will not allow anyone logged into this campaign to place manual dial calls. Default is NONE.

**Manual Dial List ID -** The default list_id to be used when an agent places 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.

**Manual Preview Dial -** This allows the agent in manual dial mode to see the lead information when they click Dial Next Number before they actively dial the phone call. There is an optional link to SKIP the lead and move on to the next one if selected. Default is PREVIEW_AND_SKIP.

**Manual Call Time Check -** If this option is enabled, it will check all manual dial calls to make sure they are within the call time settings set for the campaign. Default is DISABLED.

**Manual Dial API -** This option allows you to set the Agent API to make either one call at a time, STANDARD, or the ability to queue up manual dial calls and have them dial automatically once the agent goes on pause or is available to take their next call with the option to disable the automatic dialing of these calls, QUEUE, or QUEUE_AND_AUTOCALL which is the same as QUEUE but without the option to disable the automatic dialing of these calls. If an agent has more than one call queued up for them they will see the count of how many manual dial calls are in queue right below the Pause button, or Dial Next Number button. We suggest that if QUEUE is used that you send API actions using the preview=YES option so you are not repeatedly dialing calls for the agent without notice. Also, if using QUEUE and heavily using manual dial calls in a non MANUAL dial method, we would recommend setting the Agent Pause After Each Call option to Y. Default is STANDARD.

**Manual Dial CID -** This defines whether an agent making manual dial calls will have the campaign caller ID settings used, or their agent phone caller ID settings used. Default is CAMPAIGN. If the Use Custom CID campaign option is enabled or the list Campaign CID Override setting is used, this setting will be ignored.

**Phone Post Time Difference Alert -** This manual-dial-only feature, if enabled, will display an alert if the time zone for the lead postal code, or zip code, is different from the time zone of the area code of the phone number for the lead. The OUTSIDE_CALLTIME_ONLY option will only show the alert if the two time zones are different and one of the time zones is outside of the call time selected for the campaign. OUTSIDE_CALLTIME_PHONE will only check the time zone of the phone number of the lead and alert if it is outside of the local call time. OUTSIDE_CALLTIME_POSTAL will only check the time zone of the postal code of the lead and alert if it is outside of the local call time. OUTSIDE_CALLTIME_BOTH will check the postal code and phone number for being within the local call time, even if they are in the same time zone. These alerts will show in the call log info, callbacks list info, search results info, when a lead is dialed and when a lead is previewed. Default is DISABLED.

**In-Group Manual Dial -** allows you to enable agents to place manual dial outbound calls that are logged as in-group calls assigned to a specific in-group. The MANUAL_DIAL option allows the placing of phone calls out through an In-Group to the agent placing the call. The NO_DIAL option allows the agent to log time on a call that does not exist, as if it were a real call, this is often used for logging email or faxing time. The BOTH option will allow both call and no-call in-group dialing. The default is DISABLED.

**In-Group Manual Dial Select -** This option is only active if the above In-Group Manual Dial feature is not DISABLED. This option restricts the selectable In-Groups that the agent can place In-Group Manual Dial calls through. CAMPAIGN_SELECTED will show only the in-groups that the campaign has set as allowable in-groups. ALL_USER_GROUP will show all of the in-groups that are viewable to the members of the user group that the agent belongs to.

**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.

**Agent Screen Extended Alt Dial** - This feature allows for agents to access extended alternate phone numbers for leads beyond the standard Alt Phone and Address3 fields that can be used in VICIDIAL for phone numbers beyond the main phone number. The Extended phone numbers can be dialed automatically using the Auto-Alt-Dial feature in VICIDIAL Campaign settings, but enabling this Agent Screen feature will also allow for the agent to call these numbers from their agent screen as well as edit their information.

**3-Way Call Outbound Caller ID** - This defines what is sent out as the outbound caller ID number from 3-way calls placed by the agent, CAMPAIGN uses the custom campaign caller ID, CUSTOMER uses the number of the customer that is active on the agents screen and AGENT_PHONE uses the caller ID for the phone that the agent is logged into. AGENT_CHOOSE allows the agent to choose which caller ID 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. Placing 88 in this field, enables passthru to allow the agents to hear ringing(this only works with campaigns that use the standard dial prefix of "9").

**Customer 3-Way Hangup Logging** - If this option is ENABLED the user_call_log will log when a customer hangup up if they hang up during a 3-way call. Also, this can allow for the Customer 3-way hangup action if one is defined below. Default is ENABLED.

**Customer 3-Way Hangup Seconds -** If Customer 3-way logging is enabled, this option allows you to define the number of seconds after the customer hangup is detected before it is actually logged and the optional customer 3-way hangup action is executed. Default is 5 seconds.

**Customer 3-Way Hangup Action -** If Customer 3-way logging is enabled, this option allows you to have the agent screen automatically hang up on the call and go to the DISPO screen if this option is set to DISPO. Default is NONE.

**Group Alias Allowed** - If you want to allow your agents to use group aliases then you need to set this to Y. Group Aliases are explained more in the Admin section, they allow agents to select different caller IDs for outbound manual calls that they may place. Default is N.

**Default Group Alias** - If you have allowed Group Aliases then this is the group alias that is selected first by default when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

**QM CallStatus Override** - If QueueMetrics integration is enabled in the system settings then this setting allow the overriding of the System Settings setting for CallStatus queue_log entries. Default is DISABLED which will use the system setting.

**QM Phone Environment -** If QueueMetrics integration is enabled in the system settings then this setting allow the insertion of this data value in the data4 field of the queue_log for agent activity records. Default is empty for disabled.

**Vtiger Search Category** - If Vtiger integration is enabled in the system settings then this setting will define where the vtiger_search.php page will search for the phone number that was entered. There are 4 options that can be used in this field: LEAD- This option will search through the Vtiger leads only, ACCOUNT- This option will search through the Vtiger accounts and all contacts and sub-contacts for the phone number, VENDOR- This option will only search through the Vtiger vendors, ACCTID- This option works only for accounts and it will take the 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.

**PLLB Grouping** - Phone Login Load Balancing Grouping, only allowed if there are multiple agent servers and phone aliases are present on the system. If set to ONE_SERVER_ONLY it will force all agents for this campaign to login to the same server. If set to CASCADING it will group logged in agents on the same server until PLLB Grouping Limit number of agents are reached, then the next agent will login to the next server with the least number of agents. If set to DISABLED the standard Phone Aliases behavior of each agent finding the server with the least number of non-remote agents logged into it will be used. Default is DISABLED.

**PLLB Grouping Limit -** Phone Login Load Balancing Grouping Limit. If PLLB Grouping is set to CASCADING then this setting will determine the number of agents acceptable in each server for this campaign. Default is 50.

**CRM Popup Login -** If set to Y, the CRM Popup Address is used to open a new window on agent login to this campaign. Default is N.

**CRM Popup Address -** The web address of a CRM login page, it can have variables populated just like the web form address, with the VAR in the front and using --A--user_custom_one--B-- to define variables.

**Start Call URL -** This web URL address is not seen by the agent, but it is called every time a call is sent to an agent if it is populated. Uses the same variables as the web form fields and scripts. This URL can NOT be a relative path. The Start URL does not work for Manual dial calls. This feature will work with Remote Agents. 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. NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. Or DROP calls could be sent to a list on list in another campaign, so that those customers can be given more care. The script can also be found in the Non-agent API document:
VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1

You can even send different statuses to various other lists (exp. "STATUS 1" to LIST A, while sending "STATUS 2" to LIST B). You will just need to affix _1 to the end of each specific variable comment (The next would be _2 then _3 and so on). The Script example below shows exactly how this would work. You can send leads to up to 99 different lists.

**No Agent Call URL -** This web URL address is not seen by the agent, but if it is populated it is called

every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. The variable “dispo” can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank.

**Extension Append CID -** If enabled, the calls placed from this campaign will have a space and the phone extension of the agent appended to the end of the Caller ID name for the call before it is sent to the agent. Default is N for disabled.

**Blind Monitor Warning -** This option if enabled will let the agent know in various optional ways if they are being blind monitored by someone. DISABLED means this feature is not active, ALERT will only pop an alert up on the agent screen, NOTICE will post a note that stays up on the agent screen as long as theya re being monitored, AUDIO will play the filename defined below when an agent is starting to be monitored and the other options are combinations of the above options. Default is DISABLED.

**Blind Monitor Notice -** This is the message that will show on the agent screen while they are being monitored if the NOTICE option is selected. Default is -Someone is blind monitoring your session-.

**Blind Monitor Filename -** This is the audio file that will play in the agents session at the start of someone blind monitoring them. This prompt will be played for everyone in the session including the customer if any is present. Default is empty.

**Allowed Inbound Groups** - For CLOSER campaigns only. Here is where you select the inbound groups you want agents in this CLOSER campaign to be able to take calls from. It is important for BLENDED inbound/outbound campaigns only to select the inbound groups that are used for agents in this campaign. The calls coming into the inbound groups selected here will be counted as active calls for a blended campaign even if all agents in the campaign are not logged in to receive calls from all of those selected inbound groups.

**Default Transfer Group -** This field is the default In-Group that will be automatically selected when the agent goes to the transfer-conference frame in their agent interface.

**Allowed Transfer Groups -** With these checkbox listings you can select the groups that agents in this campaign can transfer calls to. Allow Closers must be enabled for this option to show up.

## Lists Within This Campaign

This section will show you all of the lists that are assigned to this campaign. You can see the list ID, name, description, number of leads in the list, whether the list is active and what date and time the last call was placed from the list. Also in this section is the ability to set lists to active and inactive in bulk by checking or unchecking the checkbox in each list record and then clicking on the SUBMIT ACTIVE LIST CHANGES button.

## Dialable Leads and Leads in the Hopper

There is a tally of the dialable leads in this campaign as well as a count of the total number of leads in the hopper. Also, below those lines is a link to see what leads are in the hopper. That report shows you

more detail information on the leads in the hopper including the called count, status, phone number state and other information.

## Campaign Ranks and Call Counts

There is a section in the Basic View for Campaigns at the bottom of the screen that shows the ranks for all agents for a campaign and the number of calls that each agent has taken in that campaign for the day.

## Test Outbound Call

This setting enables the ability to enter a phone code and phone number into fields at the bottom of the Campaign Detail screen and place a phone call to that number as if it were a lead being auto-dialed in the system. The phone number will be stored as a new lead in the manual dial list ID list. The campaign must be active for this feature to be enabled, and it is recommended that the lists assigned to the campaign all be set to inactive. The dial prefix, dial timeout and all other dialing related features, except for DNC and call time options, will affect the dialing of the test number. The phone call will be placed on the server selected as the voicemail server in the system settings. Default is 0 for disabled.

## Campaign-Specific Custom Statuses

Through the use of custom campaign statuses, you can have statuses that only exist for a specific campaign. The Status must be 1-6 characters in length, the description must be 2-30 characters in length and the "Selectable" field defines whether it shows up in the agent interface as a disposition. In this section of the Campaign Modification Detail screen you can add new Custom Statuses one at a time or remove existing ones by clicking on the DELETE link next to the status listing. For the Campaign's DNC and campaign-DNC list settings to work properly you must remember to properly set the Campaign and System Statuses to DNC=Y if you want the status to be a DNC-list-insert status.

## 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 allows an agent to use a hotkey to hangup their call, stay on the same lead, and dial another contact number from that lead.

There are also 2 HotKey options (LTMG or XFTAMM) designed to be used with the Leave-Voicemail option. When either of these selections are chosen by the agent, it triggers an automatic transfer to the Answering Machine Message specified in the campaign. The call is instantly dispositioned and the agent is immediately available to take another call.

## Campaign Lead Recycling

Through the use of lead recycling, you can call specific statuses of leads again at a specified interval without resetting the entire list. Lead recycling is campaign-specific and does not have to be a selected dial status in your campaign. The attempt delay field is the number of seconds until the lead can be placed back in the hopper, this number must be at least 120 seconds. The attempt maximum field is the maximum number of times that a lead of this status can be attempted before the list needs to be reset, this number can be from 1 to 10. You can activate and deactivate a lead recycle entry with the provided links. This feature is only recommended for Busy or "B" status leads. This feature is not intended to be used with settings of several days. When a lead's recycling target time hits it will be put into the dial hopper first before any other leads that would be put into the hopper regardless of how the lead order is set for the campaign.

## Auto Alt-Number Dialing

If the Auto Alt-Number Dialing field is set to anything but NONE, then the leads that are dispositioned under these auto alt dial statuses will have their alt_phone and-or address3 fields dialed after any of these no-answer statuses are set. The Campaign Auto-Alt-Dial setting must be enabled for this to be active.
NOTE: MULTI_LEAD Auto-Alt-Dial to use the Auto-Alt-Dial Statuses as set in the campaign automatically. If you are using MULTI_LEAD you may need to add statuses like DROP, PDROP and others to your campaign's auto-alt dial statuses so that the other leads tied by vendor_lead_code in the campaign's lists are not deactivated.

## Campaign List Mix

The basic idea behind List Mix is to be able to define the leads that you want to dial with a high degree of control. You can define a set of statuses in a single list to take a percentage of the leads to dial out of, and then take another percentage of leads from another set of statuses in another list. You can then have the leads called in order of priority, mixed evenly or called randomly from the selected groups. The issues with using List Mix are that you must have a clear idea of what leads you have available and keep on top of what you are dialing. You may run out of a specific groups of leads and you would be dialing leads that are not in the percentage mix that you wanted. The dialer will halt calling if it can not maintain the percentage mix specified.

## Campaign Survey

The campaign survey section is used to configure Survey or Press-1 type campaigns. It should be noted that if you are calling consumers in the USA with this type of calling, that it will be illegal as of September 1, 2009 if you do not get expressed written consent from the consumers that you are calling in this way. For more information on this see the Regulations section of this manual.

Tutorial K goes over how to set up a Survey-type campaign. Here is an overview of all of the fields in the Survey section of the Campaign screen:

**Survey First Audio File** - This is the audio filename that is played as soon as the customer picks up the phone when running a survey campaign

**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 Wait Seconds** - the number of seconds (when in Survey mode) the system will wait, after the message, for input from the person called until the Survey No Response Action is triggered.

**Survey Opt-in Audio File** - This is the audio filename that is played when the customer has opted-in to the survey, not opted-out or not responded if the no-response-action is set to OPTOUT. After this audio file is played, the Survey Method action is taken.

**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. CALLMENU sends the customer to the Call Menu indicated in the "Survey Call Menu" field below.

**Survey No-Response Action** - This defines what will happen if there is no response to the survey question, after the message and the time indicated in the Survey Wait Seconds has passed. 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 press a digit and the No-Response action is set to OPTOUT, then the customer will be hung up. DROP will send no-response calls to the campaign's Drop Action.

**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.

**Survey Call Menu -** If the method is set to CALLMENU, this is the Call Menu that the customer is sent to if they opt-in.

**Survey Recording -** If enabled, this will start recording when the call is answered. Only recommended if the method is not set to transfer to an agent. Default is N for disabled. If set to Y_WITH_AMD even answering machine detected message calls will be recorded.

**List Order Mix -** Overrides the Lead Order and Dial Status fields. This feature uses the List and status parameters for the selected List Mix entry in the List Mix sub section instead. Default is DISABLED.

**List Mix ID -** ID of the list mix. Must be from 2-20 characters in length with no spaces or other special punctuation.

**List Mix Name -** Descriptive name of the list mix. Must be from 2-50 characters in length.

**List Mix Detail -** The composition of the List Mix entry. Contains the List ID, mix order, percentages and statuses that make up this List Mix. The percentages always have to add up to 100, and the lists all have to be active and set to the campaign for the order mix entry to be Activated.

**List Mix Method -** The method of mixing all of the parts of the List Mix Detail together. EVEN_MIX will mix leads from each part interleaved with the other parts, like this 1,2,3,1,2,3,1,2,3. IN_ORDER will put the leads in the order in which they are listed in the List Mix Detail screen 1,1,1,2,2,2,3,3,3. RANDOM will put them in RANDOM order 1,3,2,1,1,3,2,1,3. Default is IN_ORDER.

## Agent Pause Codes

If the 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.

## Presets

This feature replaces the default “Transfer-Conf” fields in the campaign. Instead this enables an admin to create an almost unlimited menu of transfer/conference options for the agent. This feature is available once “Enable Transfer Presets” has been enabled in the campaign. Select the “QC” link at the top to create the preset list of transfer and/or conference phone numbers. The menu allows for a Preset Name, the hone number, and any additional DTMF code to follow. The number can also remain hidden from the agent. A “Presets” link appears at the bottom right corner of the agent's screen (in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it shows all their available preset phone numbers. Selecting the entry from the list places it in the “Number to Call” field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact_information is enabled on your system, and is a custom feature.

## AC-CID (Area Code Caller IDs)

Allows you the ability to set custom caller ID numbers per campaign for outbound calls by area code. You can even set multiple caller IDs per area code. Any calls placed from the campaign to leads in the indicated area code, will display the phone number in the “CID Number” field as their outbound call ID. To add an entry, indicate the area code to be called, the Outbound CID that should appear, a brief description, and click “submit”. This page also shows a list of all active AC-CIDs for this campaign.

## QC

The VICIdial Quality control module allows admins a process to easily review their agent's work and verify customer information. In advance, the administrators pre-select the specific campaigns and call statuses to audit. (See the “Quality Control” section of this manual for more details)

**QC Enable** - allows the feature to be implemented on the campaign.

**QC Statuses** - contains a complete list of statuses available in the campaign. Marking the checkbox indicates the statuses that will be audited. Once enabled, all leads marked with the indicated statuses are included in the Quality Control process.

**QC WebForm** - The designated website address the QC agent will be directed to when clicking on the WEBFORM link in the QC screen.

**QC Script** - This is the script that can be used by QC agents in the SCRIPT tab in the QC screen.

**QC Shift** - The shift timeframe used to pull QC records for a campaign. The days of the week are ignored for these functions.

**QC Get Record Launch** - Allows one of the following to be triggered upon a QC agent receiving a new record (SCRIPT, WEBFORM, QCSCRIPT, or QCWEBFORM).

**QC Show Recording** - Allows for a recording that may be linked with the QC record to be displayed in the QC agent screen

## Real-time Campaign Stats

From the Campaign Modification screen click the Real-time link at the top of the page, and you will see a real-time campaign screen that will show various statistics for the day like the number of dialable leads, leads in the hopper, dropped calls, etc... There are also more server-specific Real-time reports that will be mentioned later in this manual.

## Logout All Agents From a Campaign

This link at the bottom of the page allows you to immediately logout all agents from the campaign without them knowing, and will stop all sending of calls to agents (until they login again). Use this feature with caution. This does not properly log their logout time, and is for use only after a shift has ended and agents have forgotten to log out. It can also be used in case of an emergency where you must stop dialing on a campaign immediately.

## Delete Campaign

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

## Historical and Summary Campaign Reports

From the REPORTS tab of the administration web pages there are links to the VDAD OUTBOUND, CLOSER INBOUND and AGENT reports which all allow you to see summary data on the calling for a specific day for a specific campaign.

 ©2014 Vicidial Group

# QUEUEMETRICS INTEGRATION

QueueMetrics is a proprietary pay-for 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/.

 ©2014 Vicidial Group

# ZOIPER WEBPHONE INTEGRATION

Zoiper offers a web-embedded phone in addition to it's stand-alone soft-phone. The zoiper web phone is compatible with Microsoft Windows based agent systems only. The zoiper web phone is commercial software and is licensed by fully-qualified domain name (i.e. “testphone.vicidial.org”), meaning that the server which serves web pages to that URL will be the only one that the web phone can be used from, and domain name wildcards are not allowed.

There are several places within the Admin web interface that are integrated with specific zoiper web phone features, such as the ability in Phones to define if the phone is to be a webphone, whether to use the server's external server IP, whether the phone will auto-answer when called and if the dialpad is usable or not.

We have also included the ability for the zoiper web phone to be displayed inside of the agent screen. It is loaded when the agent screen is loaded, and it can even be minimized while in use.

For more information on the zoiper web phone, go here: http://www.zoiper.com/webphone/

 ©2014 Vicidial Group

# CEPSTRAL INTEGRATION

Cepstral provides text to speech integration to VICIdial. Depending on how your System Administrator has set up the integration on your server, VICIdial can integrate with Cepstral in the following ways:
- Any of VICIdial's Campaign-related audio prompts can utilize TTS scripts
- Cepstral uses SSML to allow you to control aspects of speech such as pronunciation, volume, pitch, rate, etc.
- The speech scripting can utilize any of the default lead tables.
(for configuration information see tutorial - S. Brief overview of Cepstral Text To Speech software integration.)

Before purchasing the licenses from Cepstral, determine the number of channels needed, and the number of dialers it will be installed in. To integrate with VICIdial it requires the purchase of 3 separate license. is based not only on the number of servers, but the number of concurrent channels (lines speaking at the same time), and voices (they can buy more than 1 voice if they need to). The TTS software is installed on each dialer that will be using the services.

1. the Voice license – Cepstral offers various speaking voice to suit different needs. This is purchased as a per server license. (the voice needs to be “8kHz – for Linux”)
2. The Channel license – The number of channels Cepstral may us concurrently to generate voice. This is purchased as a per channel license.
3. Save to file license – This is integral component in the VICIdial's TTS process. This is purchased as a per server license.

 ©2014 Vicidial Group

# ORECX OREKA INTEGRATION

Orecx offers the Oreka open-source software suite providing advanced recording capabilities with Voice-over-IP systems like Vicidial. Oreka will require additional configuration to work properly. It requires you to set up your VICIdial servers in pairs (also known as “server twining”) to operate. Depending on how your System Administrator has set up the integration on your server, VICIdial can integrate with Oreka in the following ways:
- It allows for the capture of the SIP audio and can handle audio compression
- Oreka can also capture the agent's screen, so every action on the call can be logged.

Please visit the Orecx website (http://www.orecx.com/web/index.php ) for more information on their products & implementation.

 ©2014 Vicidial Group

# 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 very fast detection of humans and machines on calls.

Your system administrator must set up the CPD software as well as patch Asterisk for this software to work(If you installed a ViciBox image then your system is already patched for CPD compatibility). Once it is set up, you can activate this on a per-campaign basis using the "CPD AMD Action" option in the Campaign Detail screen, you enable this setting either by setting it to DISPO which will disposition the call as (AA for Answering Machine or AFAX for Fax Machine) and hang it up if the call is being processed and has not been sent to an agent yet or by setting it to MESSAGE which will send the call to the defined Answering Machine Message for this campaign.

The CPD has the added benefit of lowering the Dropped/Answered percentage by identifying potentially dropped calls as not Human, meaning that you can exclude them from the results yielding a lower drop percentage.

One other added benefit is the ability to more accurately classify Pre-Answer call progress information like SIT tones and more detailed grouping of Disconnects and Congestion, which Asterisk is not capable of providing. This can give you a much more accurate picture of the status of your leads.

Sangoma CPD works as a SIP proxy server, and it works best on a separate machine from a VICIdial installation. For scaling, it is best to limit a CPD server to 200 concurrent outbound calls on a single quad-core CPU system.

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

 ©2014 Vicidial Group

# 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/

**NOTE:** Vtiger integration is no longer under active development as part of the VICIdial project. The three companies that had been sponsoring this development have all stopped using Vtiger in favor of other options.

**Security Alert:** Because of several large security exploits that exist in Vtiger as well as problems with scaling the database for vtiger use, we no longer recommend VICIdial integration in any situation..

# Non-agent API document

This document describes the functions of an API(Application Programming Interface) for all functions NOT directly relating to the VICIDIAL Agent screen. This functionality was rather limited at first, but critical functions are constantly identified and programmed into it. There is also an agent API script, that follows this section.

## *Changes:*

80724-1723 - First build
90428-0208 - Added blind_monitor function
90513-1720 - Added sounds_list function
90721-1432 - Added rank and owner
90904-1535 - Added moh_list musiconhold function
90916-2342 - Added vm_list voicemail list
91203-1140 - Added agent_ingroup_info feature
91216-0331 - Added duplication check features to add_lead function
100118-0543 - Added new Australian and New Zealand DST schemes (FSO-FSA and LSS-FSA)
100704-1148 - Added custom fields inserts to the add_lead function
100718-0245 - Added update_lead function to update existing leads
100723-1333 - Added no_update option to the update_lead function
100728-1952 - Added delete_lead option to the update_lead function
100924-1403 - Added called_count as an update_lead option
101111-1536 - Added vicidial_hopper.source to vicidial_hopper inserts
101117-1104 - Added callback and custom field entry delete to delete_lead option
101206-2126 - Added recording_lookup and did_log_export functions
110127-2245 - Added add_user and add_phone functions
110306-1044 - Added add_list and update_list functions
110316-2035 - Added reset_time variable and NAMEPHONE dup search
110404-1356 - Added uniqueid search parameter to recording_lookup function
110409-0822 - Added run_time logging of API functions
110424-0854 - Added option for time zone code lookups using owner field in add_lead function
110529-1220 - Added time zone information output to version function
110614-0726 - Added reset_lead option to update_lead function(issue #502)
110705-1928 - Added options for USACAN 4th digit prefix(no 0 or 1) and valid areacode filtering to add_lead
110821-2318 - Added update_phone, add_phone_alias, update_phone_alias functions
110928-2110 - Added callback options to add_lead and update_lead
111106-0959 - Added user_group restrictions to some functions
120127-1331 - Small fix for plus replacement in custom fields strings for add/update_lead functions
120210-1215 - Small change for hopper adding vendor_lead_code
120213-1613 - Added optional logging of all non-admin.php requests, enabled in options.php
120326-1307 - Added agent_stats_export function
120810-0859 - Added add_group_alias function, altered agent_stats_export function
120912-2042 - Added user_group_status and in_group_status functions
120913-1255 - Added update_log_entry function
121116-1938 - Added state call time restrictions to add_lead hopper insert function
121125-2210 - Added Other Campaign DNC option and list expiration date option
130328-0949 - Added update_phone_number option to update_lead function
130405-1538 - Added agent_status function
130420-1938 - Added NANPA prefix validation and timezone options
130614-0907 - Added pause code to output of agent_status function
130617-2232 - Added real-time sub-statuses to output of agent_status function
140124-1057 - Added callid_info function
140206-1205 - Added update_user function

140211-1056 - Added server_refresh function
140214-1540 - Added check_phone_number function
140331-2119 - Converted division calculations to use MathZDC function
140403-2024 - Added camp_rg_only option to update_user function
140214-1540 - Added check_phone_number function
140331-2119 - Converted division calculations to use MathZDC function
140403-2024 - Added camp_rg_only option to update_user function

API Functions use the 'function' variable

NOTE: Just as with the Agent API, the non-agent API requires the user and pass of a valid api-enabled vicidial_users account to execute actions.

## *API functions:*

### version

shows version and build of the API, along with the date/time and timezone

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?function=version

Example responses:
VERSION: 2.4-34|BUILD: 110424-0854|DATE: 2011-05-29 12:19:22|EPOCH: 1306685962|DST: 1|TZ: -5|TZNOW: -4|

### sounds_list

outputs a list of audio files from the audio store
NOTE: api user for this function must have user_level set to 7 or higher

**Optional Fields:**
format - format of the output(tab, link, selectframe)
stage - how to sort the output(date, size, name) comments - name of the field to populate

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=sounds_list&format=selectframe&comments=fieldname&stage=date

Example responses:
<success is inferred by output of audio files list>
ERROR: sounds_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST
ERROR: sounds_list CENTRAL SOUND CONTROL IS NOT ACTIVE

### moh_list

outputs a list of music on hold classes in the system
NOTE: api user for this function must have user_level set to 7 or higher

**Optional Fields:**
format - format of the output(tab, link, selectframe)
comments - name of the field to populate

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=moh_list&format=selectframe&comments=fieldname&stage=date

Example responses:
<success is inferred by output of moh classes list>
ERROR: moh_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST
ERROR: moh_list CENTRAL SOUND CONTROL IS NOT ACTIVE

## vm_list

outputs a list of voicemail boxes in the system
NOTE: api user for this function must have user_level set to 7 or higher

**Optional Fields:**
format - format of the output(tab, link, selectframe)
comments - name of the field to populate

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=vm_list&format=selectframe&comments=fieldname&stage=date

Example responses:
<success is inferred by output of voicemail boxes list>
ERROR: vm_list USER DOES NOT HAVE PERMISSION TO VIEW VOICEMAIL BOXES LIST
ERROR: vm_list CENTRAL SOUND CONTROL IS NOT ACTIVE

## blind_monitor

calls user-defined phone and places them in session as blind monitor
NOTE: api user for this function must have user_level set to 7 or higher

**Required Fields:**
phone_login - alpha-numeric, no spaces or special characters allowed
session_id - must be all numbers, 7 digits
server_ip - must be all numbers and dots, max 15 characters
source - description of what originated the API call (maximum 20 characters)
stage - MONITOR, BARGE or HIJACK, default is MONITOR (HIJACK option is not currently functional)

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=blind_monitor&phone_login=350a&session_id=8600051&server_ip=10.10.10.16&stage=MONITOR

Example responses:
SUCCESS: blind_monitor HAS BEEN LAUNCHED - 350a|010*010*010*017*350|8600051
ERROR: blind_monitor INVALID PHONE LOGIN - 350q
ERROR: blind_monitor INVALID SESSION ID - 8602051
ERROR: blind_monitor USER DOES NOT HAVE PERMISSION TO BLIND MONITOR - 6666|0
ERROR: NO FUNCTION SPECIFIED

## add_lead

adds a new lead to the vicidial_list table with several fields and options
NOTE: api user for this function must have modify_leads set to 1 and user_level must be set to 8 or higher

**Required Fields:**
phone_number - must be all numbers, 6-16 digits
phone_code - must be all numbers, 1-4 digits, defaults to 1 if not set
list_id - must be all numbers, 3-12 digits, defaults to 999 if not set
source - description of what originated the API call (maximum 20 characters)

**Settings Fields:**
dnc_check - Y, N or AREACODE, default is N
campaign_dnc_check - Y, N or AREACODE, default is N
campaign_id - 2-8 Character campaign ID, required if using campaign_dnc_check or callbacks
add_to_hopper - Y or N, default is N
hopper_priority - 99 to -99, the higher number the higher priority, default is 0
hopper_local_call_time_check - Y or N, default is N. Validate the local call time and/or state call time before inserting lead in the hopper
duplicate_check - Check for duplicate records in the system, can select more than one (duplicate_check=DUPLIST-DUPTITLEALTPHONELIST)
If duplicate is found, will return error, the duplicate data and lead_id and list_id of existing record
Here are the duplicate_check options:
DUPLIST - check for duplicate phone_number in same list
DUPCAMP - check for duplicate phone_number in all lists for this list's campaign
DUPSYS - check for duplicate phone_number in entire system
DUPTITLEALTPHONELIST - check for duplicate title and alt_phone in same list
DUPTITLEALTPHONECAMP - check for duplicate title and alt_phone in all lists for this list's campaign
DUPTITLEALTPHONESYS - check for duplicate title and alt_phone in entire system
DUPNAMEPHONELIST - check for duplicate first_name, last_name and phone_number in same list
DUPNAMEPHONECAMP - check for duplicate first_name, last_name and phone_number in all lists for this list's campaign
DUPNAMEPHONESYS - check for duplicate first_name, last_name and phone_numbe in entire system
usacan_prefix_check - Y or N, default is N. Check for a valid 4th digit for USA and Canada phone numbers (cannot be 0 or 1)
usacan_areacode_check - Y or N, default is N. Check for a valid areacode for USA and Canada phone numbers

nanpa_ac_prefix_check - Y or N, default is N. Check for a valid NANPA areacode and prefix, if optional NANPA data is on the system

custom_fields - Y or N, default is N. Defines whether the API will accept custom field data when inserting leads into the vicidial_list table. For custom fields to be inserted, just add the field label as a variable to the URL string. For example, if the field_label is "favorite_color" you would add "&favorite_color=blue"

tz_method - <empty>, POSTAL, TZCODE or NANPA, default is <empty> which will use the country code and areacode for time zone lookups

Here are the tz_method options:

POSTAL relies on the postal_code field

TZCODE relies on the owner field being populated with a proper time zone code

NANPA relies on the optional NANPA areacode prefix data being loaded on your system

callback - Y or N, default is N. Set this lead as a scheduled callback. campaign_id field is REQUIRED for callbacks

callback_status - 1-6 Character, callback status to use, default is CALLBK (vicidial_list status will be set to CBHOLD to lock)

callback_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED if callback is set. NOW can be used for current datetime.

callback_type - USERONLY or ANYONE, default is ANYONE

callback_user - User ID the USERONLY callback is assigned to

callback_comments - Optional comments to appear when the callback is called back

(for fields with spaces in the values, you can replace the space with a plus + sign[address, city, first_name, etc...])

**Optional Fields:**

vendor_lead_code - 1-20 characters

source_id - 1-50 characters

gmt_offset_now - overridden by auto-lookup of phone_code and area_code portion of phone number if applicable

title - 1-4 characters

first_name - 1-30 characters

middle_initial - 1 character

last_name - 1-30 characters

address1 - 1-100 characters

address2 - 1-100 characters

address3 - 1-100 characters

city - 1-50 characters

state - 2 characters

province - 1-50 characters

postal_code - 1-10 characters

country_code - 3 characters

gender - U, M, F (Undefined, Male, Female) - defaults to 'U'

date_of_birth - YYYY-MM-DD

alt_phone - 1-12 characters

email - 1-70 characters

security_phrase - 1-100 characters

comments - 1-255 characters

multi_alt_phones - 5-1024 characters (see examples for more info)
rank - 1-5 digits
owner - 1-20 characters (user ID, Territory or user group)

Multi-ALT-Phones format:
7275551212_1_work!7275551213_1_sister+house!1234567890_1_neighbor

The multi-alt-phones field is formatted as a field of phone-number/phone-code/phone-note set of data(phone code and alt_note are both optional and the phone code can be overridden by the force phone code flag). The record delimiter is an exclamation point with the optional phone code and note delimited within the record by an underscore character _.

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551212&phone_code=1&list_id=999&dnc_check=N&first_name=Bob&last_name=Wilson

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111&phone_code=1&list_id=999&dnc_check=N&first_name=Bob&last_name=Wilson&add_to_hopper=Y&hopper_local_call_time_check=Y

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111&phone_code=1&list_id=999&dnc_check=N&campaign_dnc_check=Y&campaign_id=TESTCAMP&first_name=Bob&last_name=Wilson&address1=1234+Main+St.&city=Chicago+Heights&state=IL&add_to_hopper=Y&hopper_local_call_time_check=Y&multi_alt_phones=7275551212_1_work!7275551213_1_sister+house!1234567890_1_neighbor

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551212&phone_code=1&list_id=999&dnc_check=N&first_name=Bob&last_name=Wilson&duplicate_check=DUPLIST-DUPNAMEPHONELIST

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551212&phone_code=1&list_id=999&custom_fields=Y&favorite_color=blue

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111&campaign_id=TESTCAMP&callback=Y&callback_status=CALLBK&callback_datetime=NOW&callback_type=USERONLY&callback_user=6666&callback_comments=Comments+go+here

Example responses:
SUCCESS: add_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193715|-4
NOTICE: add_lead ADDED TO HOPPER - 7275551111|6666|193715|1677922
SUCCESS: add_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4
NOTICE: add_lead CUSTOM FIELDS VALUES ADDED - 7275551111|1234|101
NOTICE: add_lead CUSTOM FIELDS NOT ADDED, CUSTOM FIELDS DISABLED - 7275551111|Y|0
NOTICE: add_lead CUSTOM FIELDS NOT ADDED, NO CUSTOM FIELDS DEFINED FOR THIS LIST - 7275551111|1234|101
NOTICE: add_lead CUSTOM FIELDS NOT ADDED, NO FIELDS DEFINED - 7275551111|1234|101
NOTICE: add_lead MULTI-ALT-PHONE NUMBERS LOADED - 3|6666|193716
NOTICE: add_lead NOT ADDED TO HOPPER, OUTSIDE OF LOCAL TIME - 7275551111|6666|193716|-4|0

NOTICE: add_lead SCHEDULED CALLBACK ADDED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|USERONLY|CALLBK
NOTICE: add_lead SCHEDULED CALLBACK NOT ADDED, USER NOT VALID - 1234|TESTCAMP|6|
NOTICE: add_lead SCHEDULED CALLBACK NOT ADDED, CAMPAIGN NOT VALID - 1234|XYZ
NOTICE: add_lead NANPA options disabled, NANPA prefix data not loaded - 0|6666
ERROR: add_lead INVALID PHONE NUMBER LENGTH - 72755|6666
ERROR: add_lead INVALID PHONE NUMBER PREFIX - 72755|6666
ERROR: add_lead INVALID PHONE NUMBER AREACODE - 72755|6666
ERROR: add_lead INVALID PHONE NUMBER NANPA AREACODE PREFIX - 7275551212|6666
ERROR: add_lead USER DOES NOT HAVE PERMISSION TO ADD LEADS TO THE SYSTEM - 6666|0
ERROR: NO FUNCTION SPECIFIED
ERROR: add_lead DUPLICATE PHONE NUMBER IN LIST - 7275551111|101|8765444
ERROR: add_lead DUPLICATE PHONE NUMBER IN CAMPAIGN LISTS - 7275551111|101|8765444|101
ERROR: add_lead DUPLICATE PHONE NUMBER IN SYSTEM - 7275551111|101|8765444|101
ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN LIST - 1234|7275551111|101|8765444
ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN CAMPAIGN LISTS - 1234|7275551111|101|8765444|101
ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN SYSTEM - 1234|7275551111|101|8765444|101
ERROR: add_lead DUPLICATE NAME PHONE IN LIST - Bob|Smith|7275551113|101|8765444|101
ERROR: add_lead DUPLICATE NAME PHONE IN CAMPAIGN LISTS - Bob|Smith|7275551113|101|8765444|101
ERROR: add_lead DUPLICATE NAME PHONE IN SYSTEM - Bob|Smith|7275551113|101|8765444|101

## update_lead

updates lead information in the vicidial_list and custom_ tables
NOTE: api user for this function must have modify_leads set to 1 and user_level must be set to 8 or higher

**Required Fields:**

| | |
|---|---|
| lead_id - | must be all numbers, 1-9 digits, not required if using vendor_lead_code or phone_number |
| vendor_lead_code - | can be used instead of lead_id to match leads |
| phone_number - | can be used instead of lead_id or vendor_lead_code to match leads |
| source - | description of what originated the API call (maximum 20 characters) |

**Settings Fields:**

| | |
|---|---|
| search_method - | You can combine the following 3 options in this field to search the parameters you desire:<br>LEAD_ID, will attempt to find a match with the lead_id<br>VENDOR_LEAD_CODE, will attempt to find a match with the vendor_lead_code<br>PHONE_NUMBER, will attempt to find a match with the phone_number<br>For example to search lead_id and vendor_lead_code:<br>"&search_method=LEAD_ID_VENDOR_LEAD_CODE"<br>The search order is NOT preserved, Lead ID is always first, Vendor Lead Code is second and Phone number is last. Default is "LEAD_ID" |
| search_location - | Where to check for records in the system, can select only one(default is SYSTEM):<br>LIST - check for lead in same list<br>CAMPAIGN - check for lead in all lists for this list's campaign<br>SYSTEM - check for lead in entire system<br>If no list_id is defined, the the search_location will be assumed as SYSTEM |

insert_if_not_found - Y or N, will attempt to insert as a NEW lead if no match is found, default is N. Insertion will require phone_code, phone_number and list_id. lead_id will be ignored. Most of the add_lead options that are not available if you use this setting in this function.
records - number of records to update if more than 1 found (defaults to '1'[most recently loaded lead])
custom_fields - Y or N, default is N. Defines whether the API will accept custom field data when updating leads in the vicidial_list table For custom fields to be updated, just add the field label as a variable to the URL string. For example, if the field_label is "favorite_color" you would add "&favorite_color=blue"
no_update - Y or N, Setting this to Y will not perform any updates, but will instead only tell you if a lead exists that matches the search criteria, default is N.
delete_lead - Y or N, Setting this to Y will delete the lead from the vicidial_list table, default is N.
reset_lead - Y or N, Setting this to Y will reset the called-since-last-reset flag of the lead, default is N.
callback - Y, N or REMOVE, default is N. Set this lead as a scheduled callback. REMOVE will delete the scheduled callback entry
callback_status - 1-6 Character, callback status to use, default is CALLBK (vicidial_list status will be set to CBHOLD to lock)
callback_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED if callback is set. NOW can be used for current datetime.
callback_type - USERONLY or ANYONE, default is ANYONE
callback_user - User ID the USERONLY callback is assigned to
callback_comments - Optional comments to appear when the callback is called back
update_phone_number - Y or N, Optional setting to update the phone_number field, default is N.

**Editable Fields:**
user_field - 1-20 characters, this updates the 'user' field in the vicidial_list table
list_id_field - 3-12 digits, this updates the 'list_id' field in the vicidial_list table
status - 1-6 characters, not punctuation or spaces
vendor_lead_code - 1-20 characters
source_id - 1-50 characters
gmt_offset_now - overridden by auto-lookup of phone_code and area_code portion of phone number if applicable
title - 1-4 characters
first_name - 1-30 characters
middle_initial - 1 character
last_name - 1-30 characters
address1 - 1-100 characters
address2 - 1-100 characters
address3 - 1-100 characters
city - 1-50 characters
state - 2 characters
province - 1-50 characters
postal_code - 1-10 characters
country_code - 3 characters
gender - U, M, F (Undefined, Male, Female) - defaults to 'U'

| | |
|---|---|
| date_of_birth - | YYYY-MM-DD |
| alt_phone - | 1-12 characters |
| email - | 1-70 characters |
| security_phrase - | 1-100 characters |
| comments - | 1-255 characters |
| rank - | 1-5 digits |
| owner - | 1-20 characters (user ID, Territory or user group) |
| called_count - | digits only, the number of attempts dialing the lead |

**NOTES:**
- in order to set a field to empty(") set it equal to --BLANK--, i.e. "&province=--BLANK--"
- please use no special characters like apostrophes, quotes or amphersands

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=27&last_name=SMITH

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=VENDOR_LEAD_CODE&vendor_lead_code=1000019&last_name=JOHNSON

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&records=2&list_id=8107&search_location=LIST&phone_number=9999000019&last_name=WILSON

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=405794&last_name=SMITH&city=Chicago&custom_fields=Y&favorite_color=blue

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_location=LIST&search_method=PHONE_NUMBER&insert_if_not_found=Y&phone_number=9999000029&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&city=Chicago&custom_fields=Y&favorite_color=red

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&insert_if_not_found=Y&search_method=VENDOR_LEAD_CODE_PHONE_NUMBER&vendor_lead_code=89763545&phone_number=7275551212&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&custom_fields=Y&favorite_color=blue

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&search_location=LIST&search_method=VENDOR_LEAD_CODE_PHONE_NUMBER&insert_if_not_found=Y&phone_number=9999000029&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&city=Chicago&custom_fields=Y&favorite_color=red&user_field=1008&list_id_field=107&status=OLD

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=27&no_update=Y

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=27&delete_lead=Y

http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_lead&lead_id=27&delete_lead=Y&custom_fields=Y

http://server/vicidial/non_agent_api.php?

source=test&user=6666&pass=1234&function=update_lead&lead_id=406757&campaign_id=TESTCAMP&callback=Y&callback_status=CALLBK&callback_datetime=NOW&callback_type=USERONLY&callback_user=1028&callback_comments=Comments+go+here+again

Example responses:
SUCCESS: update_lead LEAD HAS BEEN UPDATED - 6666|193716
NOTICE: update_lead CUSTOM FIELDS VALUES UPDATED - 7275551111|1234|101
NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, CUSTOM FIELDS DISABLED - 7275551111|Y|0
NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, NO CUSTOM FIELDS DEFINED FOR THIS LIST - 7275551111|1234|101
NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, NO FIELDS DEFINED - 7275551111|1234|101
NOTICE: update_lead SCHEDULED CALLBACK UPDATED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|USERONLY|CALLBK
NOTICE: update_lead SCHEDULED CALLBACK NOT UPDATED, NO FIELDS SPECIFIED - 1234|
NOTICE: update_lead SCHEDULED CALLBACK ADDED - 1234|2011-09-29 12:00:01|TESTCAMP|6666|USERONLY|CALLBK
NOTICE: update_lead SCHEDULED CALLBACK NOT ADDED, USER NOT VALID - 1234|TESTCAMP|6|
NOTICE: update_lead SCHEDULED CALLBACK NOT ADDED, CAMPAIGN NOT VALID - 1234|XYZ
NOTICE: update_lead NO MATCHES FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212
SUCCESS: update_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4
SUCCESS: update_lead LEAD HAS BEEN DELETED - 7275551111|6666|999|193716|-4
NOTICE: update_lead CUSTOM FIELDS ENTRY DELETED 1 - 7275551111|6666|999|193716|-4
NOTICE: update_lead LEADS FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212|101|101
ERROR: update_lead INVALID DATA FOR LEAD INSERTION - 6666|||
ERROR: update_lead NO MATCHES FOUND IN THE SYSTEM - 6666|||
ERROR: update_lead NO VALID SEARCH METHOD - 6666|SYSTEM|||
ERROR: update_lead USER DOES NOT HAVE PERMISSION TO UPDATE LEADS IN THE SYSTEM – 6666|0

## agent_ingroup_info

shows in-group and outbound auto-dial info for logged-in agent
NOTE: api user for this function must have user_level set to 7 or higher

**Required Fields:**
agent_user - 2-20 characters
source - description of what originated the API call (maximum 20 characters)

**Settings Fields:**
stage - info(show information only), change(show options to change), text(standard non-HTML output)

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&function=agent_ingroup_info&stage=change&user=6666&pass=1234&agent_user=1000

Example responses:
ERROR: agent_ingroup_info USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0
ERROR: agent_ingroup_info INVALID USER ID - 1255|6666

## recording_lookup

looks up recordings based upon user and date or lead_id

NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
agent_user - 2-20 characters
lead_id - 1-10 digits
date - date of the calls to pull (must be in YYYY-MM-DD format)
uniqueid - uniqueid of the call, works best included with another search field

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header

**Notes:**
There is a hard limit of 100000 results

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&function=recording_lookup&stage=pipe&user=6666&pass=1234&agent_user=1000&date=2010-12-03

Example responses:
ERROR: recording_lookup USER DOES NOT HAVE PERMISSION TO GET RECORDING INFO - 6666|0
ERROR: recording_lookup INVALID SEARCH PARAMETERS - 6666|1000||2010-12-03|
ERROR: recording_lookup NO RECORDINGS FOUND - 1255|6666||2010-12-03|

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
start_time|user|recording_id|lead_id|location
2010-12-03 12:00:01|1000|534820|876409|http://server/path/to/recording/20101203_120000_1234567890_1000-all.wav

## did_log_export

exports all calls inbound to a DID for one day
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
phone_number - 2-20 characters, the DID that you want to pull logs for
date - date of the calls to pull (must be in YYYY-MM-DD format)

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header

**Notes:**
There is a hard limit of 100000 results

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&function=did_log_export&stage=pipe&user=6666&pass=1234&phone_number=3125551212&date=2010-12-03

Example responses:
ERROR: did_log_export USER DOES NOT HAVE PERMISSION TO GET DID INFO - 6666|0
ERROR: did_log_export INVALID SEARCH PARAMETERS - 6666|3125551212|2010-12-03
ERROR: did_log_export NO RECORDS FOUND – 1255|3125551212|2010-12-03

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
did_number|call_date|caller_id_number|length_in_sec
3125551212|2010-12-03 12:00:01|7275551212|123

## agent_stats_export

exports agent activity statistics
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**

| | |
|---|---|
| source - | description of what originated the API call (maximum 20 characters) |
| datetime_start - | start date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format) |
| datetime_end - | end date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format) |

**Settings Fields:**

| | |
|---|---|
| agent_user - | 2-20 characters, use only for one agent stats |
| stage - | the format of the exported data: csv, tab, pipe (default) |
| header - | include a header (YES) or not (NO). This is optional, default is not to include a header |
| time_format - | time format('H','HF','M','S') in hours, minutes or seconds: H = 1:23:45, M = 83:45, S = 5023 (default 'HF')<br>* HF will force hour format even for zero seconds time "0:00:00" |

**Notes:**
There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&function=agent_stats_export&time_format=M&stage=pipe&user=6666&pass=1234&agent_user=6666&datetime_start=2012-08-09+00:00:00&datetime_end=2012-08-10+23:59:59

http://server/vicidial/non_agent_apiX.php?DB=0&stage=pipe&user=6666&pass=1234&source=test&function=agent_stats_export&datetime_start=2012-03-26+00:00:00&datetime_end=2012-03-26+23:59:59&header=YES

Example responses:
ERROR: agent_stats_export USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0
ERROR: agent_stats_export INVALID SEARCH PARAMETERS - 6666||2010-12-03 00:00:00|2010-12-03 00:00:01
ERROR: agent_stats_export NO RECORDS FOUND - 1255||2010-12-03 00:00:00|2010-12-03 00:00:01

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the

following format:
user|full_name|user_group|calls|login_time|total_talk_time|avg_talk_time|avg_wait_time|pct_of_queue|pause_time|sessions|avg_session|pauses|avg_pause_time|pause_pct|pauses_per_session|total_wait_time
1029|test agent|ADMIN|1|0:01:52|0:00:16|0:00:16|0:00:18|16.7%|54|3|0:00:37|5|0:00:11|48.2%|2|0:00:32
6666|Admin|ADMIN|5|0:04:11|0:01:48|0:00:22|0:00:17|83.3%|27|2|0:02:06|4|0:00:07|10.8%|2|0:00:32

## add_user

adds a user to the system
NOTE: api user for this function must have user_level set to 8 or higher and "modify users" enabled

**Required Fields:**

| | |
|---|---|
| agent_user - | 2-20 characters (for auto-generated send 'AUTOGENERATED') |
| agent_pass - | 1-20 characters |
| agent_user_level - | 1 through 9, one digit only |
| agent_full_name - | 1-50 characters |
| agent_user_group - | 1-20 characters, must be a valid user group |

**Optional Fields:**

| | |
|---|---|
| phone_login - | 1-20 characters |
| phone_pass - | 1-20 characters |
| hotkeys_active - | 0 or 1 |
| voicemail_id - | 1-10 digits |
| email - | 1-100 characters |
| custom_one - | 1-100 characters |
| custom_two - | 1-100 characters |
| custom_three - | 1-100 characters |
| custom_four - | 1-100 characters |
| custom_five - | 1-100 characters |

NOTE: This function does not work with Vtiger integration

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&function=add_user&user=6666&pass=1234&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS

http://server/vicidial/non_agent_api.php?source=test&function=add_user&user=6666&pass=1234&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS&phone_login=100&phone_pass=test&hotkeys_active=1&voicemail_id=&custom_one=jjjj&custom_two=yyyy&custom_three=kkk&custom_four=wwww&custom_five=hhhh

Example responses:
ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS - 6666|0
ERROR: add_user YOU MUST USE ALL REQUIRED FIELDS - 6666|1000||||
ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS IN THIS USER LEVEL - 6666|8
ERROR: add_user USER GROUP DOES NOT EXIST - 6666|ADFHR
ERROR: add_user USER ALREADY EXISTS - 6666|6666
SUCCESS: add_user USER HAS BEEN ADDED - 6666|1000|1234|8|Testing+Person|AGENTS

## update_user

updates or deletes a user entry already in the system
NOTE: api user for this function must have user_level set to 8 or higher and "modify user" enabled

**Required Fields:**

| | |
|---|---|
| agent_user - | 2-20 characters |

**Optional Fields:**

| | |
|---|---|
| agent_pass - | 1-20 characters |
| agent_user_level - | 1 through 9, one digit only |
| agent_full_name - | 1-50 characters |
| agent_user_group - | 1-20 characters, must be a valid user group |
| phone_login - | 1-20 characters |
| phone_pass - | 1-20 characters |
| hotkeys_active - | 0 or 1 |
| voicemail_id - | 1-10 digits |
| email - | 1-100 characters |
| custom_one - | 1-100 characters |
| custom_two - | 1-100 characters |
| custom_three - | 1-100 characters |
| custom_four - | 1-100 characters |
| custom_five - | 1-100 characters |
| active - | 'Y' or 'N' |
| campaign_rank - | from -9 to 9, this will change the campaign rank for this user on all campaigns |
| campaign_grade - | from 1 to 10, this will change the campaign grade for this user on all campaigns |
| camp_rg_only - | 0 or 1, this will set only one campaign rank/grade for this user, requires campaign_id to be set |
| campaign_id - | only required for use with camp_rg_only |

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_pass=9876
http://server/vicidial/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_user_level=3
http://server/vicidial/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&agent_full_name=Testing&hotkeys_active=1&active=Y
http://server/vicidial/non_agent_api.php?source=test&function=update_user&user=6666&pass=1234&agent_user=2424&campaign_rank=3&campaign_grade=4

Example responses:

ERROR: update_user USER DOES NOT HAVE PERMISSION TO UPDATE USERS - 6666|0
ERROR: update_user USER DOES NOT HAVE PERMISSION TO DELETE USERS - 6666|7878
ERROR: update_user YOU MUST USE ALL REQUIRED FIELDS - 6666||
ERROR: update_user USER DOES NOT EXIST - 6666|78789
ERROR: update_user USER DOES NOT HAVE PERMISSION TO UPDATE THIS USER - 6666|7878
ERROR: update_user YOU MUST USE A VALID FULL NAME, THIS IS AN OPTIONAL FIELD - 6666|
ERROR: update_user YOU MUST USE A VALID USER LEVEL, THIS IS AN OPTIONAL FIELD - 6666|0|9|1
ERROR: update_user YOU MUST USE A VALID USER GROUP, THIS IS AN OPTIONAL FIELD - 6666|FAKEGROUP|0
ERROR: update_user YOU MUST USE A VALID PHONE LOGIN, THIS IS AN OPTIONAL FIELD - 6666|fakephone|0|0

ERROR: update_user YOU MUST USE A VALID PHONE PASSWORD, THIS IS AN OPTIONAL FIELD - 6666|0
ERROR: update_user YOU MUST USE A VALID HOTKEYS SETTING, THIS IS AN OPTIONAL FIELD - 6666|2
ERROR: update_user YOU MUST USE A VALID VOICEMAIL ID, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID EMAIL, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CUSTOM ONE, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CUSTOM TWO, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CUSTOM THREE, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CUSTOM FOUR, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CUSTOM FIVE, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666
ERROR: update_user YOU MUST USE A VALID CAMPAIGN RANK, THIS IS AN OPTIONAL FIELD - 6666|0
ERROR: update_user YOU MUST USE A VALID CAMPAIGN GRADE, THIS IS AN OPTIONAL FIELD - 6666|0
ERROR: update_user NO UPDATES DEFINED - 6666|0
NOTICE: update_user USER CAMPAIGN RANKS HAVE BEEN UPDATED - 6666|9|10
NOTICE: update_user USER CAMPAIGN RANKS HAVE BEEN UPDATED - 6666|9|10|TESTCAMP|1
SUCCESS: update_user USER HAS BEEN UPDATED - 6666|7878
SUCCESS: update_user USER HAS BEEN DELETED - 6666|7878

## add_phone

adds a phone to the system
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**

| | |
|---|---|
| extension - | 2-100 characters |
| dialplan_number - | 1-20 digits |
| voicemail_id - | 1-10 digits |
| phone_login - | 1-20 characters |
| phone_pass - | 1-20 characters |
| server_ip - | 7-15 characters, must be a valid server_ip |
| protocol - | Must be one of these: 'IAX2','SIP','Zap','EXTERNAL' |
| registration_password - | 1-20 characters |
| phone_full_name - | 1-50 characters |
| local_gmt - | timezone setting, not adjusting for DST, default: '-5.00' |
| outbound_cid - | 1-20 digits |

**Optional Fields:**

| | |
|---|---|
| phone_context - | a phone context, default is 'default' |
| email - | 1-100 characters |
| admin_user_group - | a valid user group or '---ALL---' |

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?source=test&function=add_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212

http://server/vicidial/non_agent_api.php?source=test&function=add_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212&phone_context=default&email=test@test.com

Example responses:
ERROR: add_phone USER DOES NOT HAVE PERMISSION TO ADD PHONES - 6666|0
ERROR: add_phone YOU MUST USE ALL REQUIRED FIELDS - 6666|1000||||||||||
ERROR: add_phone SERVER DOES NOT EXIST - 6666|10.0.9.9
ERROR: add_phone PHONE ALREADY EXISTS ON THIS SERVER - 6666|10.0.9.8|cc101
ERROR: add_phone PHONE LOGIN ALREADY EXISTS - 6666|cc100
ERROR: add_phone YOU MUST USE A VALID TIMEZONE - 6666|-5
SUCCESS: add_phone PHONE HAS BEEN ADDED – 6666|cc100|10.0.9.8|SIP|100

## update_phone

updates or deletes a phone entry already in the system
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**
extension - 2-100 characters
server_ip - 7-15 characters, must be a valid server_ip

**Settings Fields:**
delete_phone - Y or N, Setting this to Y will delete the phone from the system, default is N.

**Editable Fields:**
dialplan_number - 1-20 digits
voicemail_id - 1-10 digits
phone_login - 1-20 characters
phone_pass - 1-20 characters
protocol - Must be one of these: 'IAX2','SIP','Zap','EXTERNAL'
registration_password - 1-20 characters
phone_full_name - 1-50 characters
local_gmt - timezone setting, not adjusting for DST, default: '-5.00'
outbound_cid - 1-20 digits
phone_context - a phone context, default is 'default'
email - 1-100 characters
admin_user_group - a valid user group or '---ALL---'

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212

http://server/vicidial/non_agent_api.php?source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=55000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protocol=SIP&registration_password=test&phone_full_name=Extension+55000&local_gmt=-5.00&outbound_cid=7275551212&phone_context=default&email=test@test.com

http://server/vicidial/non_agent_api.php?source=test&function=update_phone&user=6666&pass=1234&extension=55000&server_ip=192.168.198.5&delete_phone=Y

Example responses:
ERROR: update_phone USER DOES NOT HAVE PERMISSION TO UPDATE PHONES - 6666|0
ERROR: update_phone YOU MUST USE ALL REQUIRED FIELDS - 6666||
ERROR: update_phone SERVER DOES NOT EXIST - 6666|10.0.9.9
ERROR: update_phone PHONE DOES NOT EXIST ON THIS SERVER - 6666|10.0.9.8|cc101
ERROR: update_phone LOGIN ALREADY EXISTS - 6666|x101
ERROR: update_phone YOU MUST USE A VALID TIMEZONE - 6666|-99
ERROR: update_phone YOU MUST USE A VALID DIALPLAN NUMBER - 6666|0
ERROR: update_phone YOU MUST USE A VALID VOICEMAIL NUMBER - 6666|0
ERROR: update_phone YOU MUST USE A VALID PHONE PASSWORD - 6666|0
ERROR: update_phone YOU MUST USE A VALID REGISTRATION PASSWORD - 6666|0
ERROR: update_phone YOU MUST USE A VALID PROTOCOL - 6666|0
ERROR: update_phone YOU MUST USE A VALID PHONE NAME - 6666|0
ERROR: update_phone YOU MUST USE A VALID PHONE CONTEXT - 6666|0
ERROR: update_phone NO UPDATES DEFINED - 6666|0
SUCCESS: update_phone PHONE HAS BEEN UPDATED - 6666|cc100|10.0.9.8|SIP|100
SUCCESS: update_phone PHONE HAS BEEN DELETED - 6666|cc100|10.0.9.8|

## add_phone_alias

adds a phone alias entry to the system
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**

| | |
|---|---|
| alias_id - | 2-20 characters |
| phone_logins - | 2-255 characters (phone logins separated by commas) |
| alias_name - | 1-50 characters |

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&function=add_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ+testing&phone_logins=100a,100b

Example responses:
ERROR: add_phone_alias USER DOES NOT HAVE PERMISSION TO ADD PHONE ALIASES - 6666|0
ERROR: add_phone_alias YOU MUST USE ALL REQUIRED FIELDS - 6666||||
ERROR: add_phone_alias PHONE ALIAS ALREADY EXISTS - 6666|x101
ERROR: add_phone_alias PHONE DOES NOT EXIST - 6666|cc100
SUCCESS: add_phone_alias PHONE ALIAS HAS BEEN ADDED - 6666|x100|testing_x100|cc100,bb100

## update_phone_alias

updates or deletes a phone alias entry already in the system
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**

| | |
|---|---|
| alias_id - | 2-20 characters |
| phone_logins - | 2-255 characters (phone logins separated by commas) |
| alias_name - | 1-50 characters |

**Settings Fields:**

delete_alias - Y or N, Setting this to Y will delete the phone alias from the system, default is N.

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?source=test&function=update_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ+testing+X&phone_logins=100a,100b

http://server/vicidial/non_agent_api.php?source=test&function=update_phone_alias&user=6666&pass=1234&alias_id=xyz100&delete_alias=Y

Example responses:

ERROR: update_phone_alias USER DOES NOT HAVE PERMISSION TO UPDATE PHONE ALIASES - 6666|0
ERROR: update_phone_alias YOU MUST USE ALL REQUIRED FIELDS - 6666||||
ERROR: update_phone_alias PHONE ALIAS DOES NOT EXIST - 6666|x101
ERROR: update_phone_alias YOU MUST USE A VALID ALIAS NAME - 6666|x
ERROR: update_phone_alias PHONE DOES NOT EXIST - 6666|cc100
SUCCESS: update_phone_alias PHONE ALIAS HAS BEEN UPDATED - 6666|x100|
SUCCESS: update_phone_alias PHONE ALIAS HAS BEEN DELETED - 6666|x100|

## add_list

adds a list to the system
NOTE: api user for this function must have user_level set to 8 or higher and "modify lists" enabled

**Required Fields:**

list_id - 2-14 digits
list_name - 6-30 characters
campaign_id - 2-8 characters, must be a valid campaign_id

**Optional Fields:**

active - Must be one of these: 'Y','N', will default to 'N'
outbound_cid - 6-20 digits
script - 1-10 characters, must be a valid script
am_message - 2-100 characters
drop_inbound_group - 1-10 characters, must be a valid in-group
web_form_address - 6-100 characters
web_form_address_two - 6-100 characters
reset_time - 4-100 characters, must be in valid 4-digit groups of 24-hour time (i.e. 0900-1700-2359)
expiration_date - 10 characters, must be in valid date format YYYY-MM-DD (i.e. 2012-11-25)

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?source=test&function=add_list&user=6666&pass=1234&list_id=1101&list_name=Test+API+list&campaign_id=TESTCAMP
http://server/vicidial/non_agent_api.php?source=test&function=add_list&user=6666&pass=1234&list_id=1101&list_name=Test+API+list&campaign_id=TESTCA

MP&active=N&outbound_cid=7275551212&script=DEMOSCRIPT&am_message=8304&drop_inbound_group=SALESLINE&web_form_address=http://www.vicidial.org/?testing=hghg

Example responses:
ERROR: add_list USER DOES NOT HAVE PERMISSION TO ADD LISTS - 6666|0
ERROR: add_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1000||
ERROR: add_list CAMPAIGN DOES NOT EXIST - 6666|TESTCIMP
ERROR: add_list LIST ALREADY EXISTS - 6666|1101
ERROR: add_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTSCRIPT
ERROR: add_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TEST_IN8
ERROR: add_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012
ERROR: add_list EXPIRATION DATE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012
SUCCESS: add_list LIST HAS BEEN ADDED - 6666|1101|TESTCAMP

## update_list

updates list information in the vicidial_lists table
NOTE: api user for this function must have user_level set to 8 or higher and "modify lists" enabled

**Required Fields:**
list_id - must be all numbers, 2-14 digits
source - description of what originated the API call (maximum 20 characters)

**Settings Fields:**
insert_if_not_found - Y or N, will attempt to insert as a new list if no match is found, default is N. If list is not found, the function will change to add_list and be processed in that way
reset_list - Y or N, Setting this to Y will reset the Called-Since-Last-Reset flag for all of the leads in this list, default is N.
delete_list - Y or N, Setting this to Y will delete the list from the vicidial_lists table, default is N.
delete_leads - Y or N, Setting this to Y will delete all of the leads with this list_id from the vicidial_list table, default is N.

**Editable Fields:**
list_name - 6-30 characters
campaign_id - 2-8 characters, must be a valid campaign_id
active - Must be one of these: 'Y','N', will default to 'N'
outbound_cid - 6-20 digits
script - 1-10 characters, must be a valid script
am_message - 2-100 characters
drop_inbound_group - 1-10 characters, must be a valid in-group
web_form_address - 6-100 characters
web_form_address_two - 6-100 characters
reset_time - 4-100 characters, must be in valid 4-digit groups of 24-hour time (i.e. 0900-1700-2359)
expiration_date - 10 characters, must be in valid date format YYYY-MM-DD (i.e. 2012-11-25)

**Notes:**
- in order to set a field to empty(") set it equal to --BLANK--, i.e. "&drop_inbound_group=--

BLANK--"
- please use no special characters like apostrophes, quotes or ampersands

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1101&list_name=Updated+test+API+list

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1101&active=N

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1102&active=N&insert_if_not_found=Y&list_name=Updated+test+API+list&campaign_id=TESTCAMP&outbound_cid=7275551212&script=DEMOSCRIPT&am_message=8304&drop_inbound_group=SALESLINE&web_form_address=http://www.vicidial.org/?testing=hghg

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1102&reset_list=Y

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1102&delete_list=Y&delete_leads=Y

http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=update_list&list_id=1102&campaign_id=ASTRICON

Example responses:
ERROR: update_list USER DOES NOT HAVE PERMISSION TO UPDATE LISTS - 6666
ERROR: update_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1
NOTICE: update_list LIST DOES NOT EXIST, SENDING TO add_list FUNCTION - 6666|1000
ERROR: update_list LIST DOES NOT EXIST - 6666|1000
ERROR: update_list CAMPAIGN DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTCIMP
ERROR: update_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTSCRIPT
ERROR: update_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TEST_IN8
ERROR: update_list LIST NAME MUST BE FROM 6 TO 30 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|test
ERROR: update_list ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U
ERROR: update_list OUTBOUND CID MUST BE FROM 6 TO 18 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|12345
ERROR: update_list ANSWERING MACHINE MESSAGE MUST LESS THAN 101 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|123...
ERROR: update_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012
ERROR: update_list EXPIRATION DATE IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012
NOTICE: update_list NO UPDATES DEFINED - 6666|
SUCCESS: update_list LIST HAS BEEN UPDATED - 6666|1101
NOTICE: update_list LEADS IN LIST HAVE BEEN RESET - 6666|1101|324
NOTICE: update_list USER DOES NOT HAVE PERMISSION TO DELETE LISTS - 6666|0
NOTICE: update_list LIST HAS BEEN DELETED - 6666|1101|1
NOTICE: update_list USER DOES NOT HAVE PERMISSION TO DELETE LEADS - 6666|0
NOTICE: update_list LEADS IN LIST HAVE BEEN DELETED - 6666|1101|324
ERROR: NO FUNCTION SPECIFIED

## add_group_alias

adds group alias to the system
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**
caller_id_number - 6-20 characters

**Optional Fields:**
group_alias_id - 3-30 characters, no spaces or punctuation allowed, if not defined, caller_id_number is used
group_alias_name - 3-50 characters, if not defined, caller_id_number is used
caller_id_name - 6-20 characters, if not defined " is default
active - 'Y' or 'N', if not defined 'Y' is default
admin_user_group - a valid user group or '---ALL---' is used as default

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&function=add_group_alias&user=6666&pass=1234&caller_id_number=7275551212
http://server/vicidial/non_agent_api.php?
source=test&function=add_group_alias&user=6666&pass=1234&caller_id_number=7275551212&group_alias_id=test_group_alias&group_alias_name=test+group+alias

Example responses:
ERROR: add_group_alias USER DOES NOT HAVE PERMISSION TO ADD GROUP ALIASES - 6666|0
ERROR: add_group_alias YOU MUST USE ALL REQUIRED FIELDS - 6666|||1000
ERROR: add_group_alias GROUP ALIAS ALREADY EXISTS - 6666|7275551212
SUCCESS: add_group_alias GROUP ALIAS HAS BEEN ADDED - 6666|7275551212|test_group_alias|test group alias

## user_group_status

real-time status of one or more user groups
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
source - description of what originated the API call (maximum 20 characters)
user_groups - pipe-delimited list of user groups to get status information for "ADMIN|AGENTS"

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header

NOTES: There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=user_group_status&user_groups=ADMIN|AGENT&header=YES

Example responses:
ERROR: user_group_status USER DOES NOT HAVE PERMISSION TO GET USER GROUP INFO - 6666|0
ERROR: user_group_status INVALID SEARCH PARAMETERS - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
usergroups|calls_waiting|agents_logged_in|agents_in_calls|agents_waiting|agents_paused|agents_in_dead_calls|

agents_in_dispo|ADMIN AGENT|0|1|0|1|0|0|0

## in_group_status

real-time status of one or more in groups
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
source - description of what originated the API call (maximum 20 characters)
in_groups - pipe-delimited list of inbound groups to get status information for "SALESLINE|SUPPORT"

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header

**Notes:**
There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&stage=csv&function=in_group_status&user_groups=SALESLINE|SUPPORT&header=YES

Example responses:
ERROR: in_group_status USER DOES NOT HAVE PERMISSION TO GET IN-GROUP INFO - 6666|0
ERROR: in_group_status INVALID SEARCH PARAMETERS - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
ingroups,total_calls,calls_waiting,agents_logged_in,agents_in_calls,agents_waiting,agents_paused,agents_in_dispo
SALESLINE SUPPORT,31,0,75,54,0,20,1

## agent_status

real-time status of one agent user
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
source - description of what originated the API call (maximum 20 characters)
agent_user - 2-20 characters, use only for one agent status

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?

source=test&user=6666&pass=1234&function=agent_status&agent_user=1234&stage=csv&header=YES

Example responses:
ERROR: agent_status USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0
ERROR: agent_status INVALID SEARCH PARAMETERS - 6666||
ERROR: agent_status AGENT NOT FOUND - 6666||
ERROR: agent_status AGENT NOT LOGGED IN - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
status,call_id,lead_id,campaign_id,calls_today,full_name,user_group,user_level,pause_code,real_time_sub_status
INCALL,M4050908070000012345,12345,TESTCAMP,1,Test Agent,AGENTS,3,LOGIN,

NOTE: real_time_sub_status field can consist of: DEAD, DISPO, 3-WAY, PARK, RING or it can be empty

## callid_info

information about a call based upon the caller_code or call ID
NOTE: api user for this function must have user_level set to 7 or higher and "view reports" enabled

**Required Fields:**
source - description of what originated the API call (maximum 20 characters)
call_id - 16-40 characters

**Settings Fields:**
stage - the format of the exported data: csv, tab, pipe(default)
header - include a header(YES) or not(NO). This is optional, default is not to include a header
detail - if set to YES, more call info will be output. Default is NO, only callid and customer talk time will be output

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?
source=test&user=6666&pass=1234&function=callid_info&call_id=M4050908070000012345&stage=csv&header=YES

Example responses:
ERROR: callid_info USER DOES NOT HAVE PERMISSION TO GET CALL INFO - 6666|0
ERROR: callid_info INVALID SEARCH PARAMETERS - 6666||
ERROR: callid_info CALL NOT FOUND - 6666||
ERROR: callid_info CALL LOG NOT FOUND - 6666||

A SUCCESS response will not show "SUCCESS", but instead will just print the results in the following format:
call_id,custtime
M4050908070000012345,725

Setting "detail=YES" will result in the following output:
call_id,custtime,call_date,campaign_id,list_id,status,user,phone
M4050908070000012345,725,2014-01-24 09:26:09,TESTCAMP,999,A,6666,3125551212

## server_refresh

forces a conf file refresh on all telco servers in the cluster
NOTE: api user for this function must have user_level set to 8 or higher and "ast admin access" enabled

**Required Fields:**
stage - "REFRESH"

Example URL string for API calls:
http://server/vicidial/non_agent_api.php?source=test&function=server_refresh&user=6666&pass=1234&stage=REFRESH

Example responses:
ERROR: server_refresh USER DOES NOT HAVE PERMISSION TO REFRESH SERVERS - 6666|0
ERROR: server_refresh YOU MUST USE ALL REQUIRED FIELDS - 6666|
SUCCESS: server_refresh SERVER REFRESH HAS BEEN TRIGGERED - 6666|1

## check_phone_number

allows you to check if a phone number is valid and dialable
NOTE: api user for this function must have user_level set to 8 or higher

**Required Fields:**

| | |
|---|---|
| phone_number - | must be all numbers, 6-16 digits |
| phone_code - | must be all numbers, 1-4 digits, defaults to 1 if not set |
| local_call_time - | must be a valid call time ID in the system |

**Optional Fields:**

| | |
|---|---|
| postal_code - | must be 5 digits. Only works for USA zipcodes, needed for POSTAL tz_method |
| state - | must be 2 letters. Only needed if state call time rules enabled |
| owner - | must be 2-5 letters. Only needed if using TZCODE tz_method |

**Settings Fields:**

| | |
|---|---|
| dnc_check - | Y, N or AREACODE, default is N |
| campaign_dnc_check - | Y, N or AREACODE, default is N |
| campaign_id - | 2-8 Character campaign ID, required if using campaign_dnc_check |
| usacan_prefix_check - | Y or N, default is N. Check for a valid 4th digit for USA and Canada phone numbers (cannot be 0 or 1) |
| usacan_areacode_check - | Y or N, default is N. Check for a valid areacode for USA and Canada phone numbers |
| nanpa_ac_prefix_check - | Y or N, default is N. Check for a valid NANPA areacode and prefix, if optional NANPA data is on the system |
| tz_method - | <empty>, POSTAL, TZCODE, NANPA or AREACODE, default is <empty> which will use the country code, AREACODE for time zone lookups relies on the phone number's areacode, POSTAL relies on the postal_code field, TZCODE relies on the owner field being populated with a proper time zone code<br>NANPA relies on the optional NANPA areacode prefix data being loaded |

on your system
(NOTE: you can do more than one method at once, i.e.: "POSTALTZCODE")

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=check_phone_number&phone_number=7275551111&call_time=9am-9pm

http://server/vicidial/non_agent_api.php?DB=0&source=test&function=check_phone_number&user=6666&pass=1234&owner=GST&postal_code=81009&phone_number=3125551212&local_call_time=9am-9pm&tz_method=AREACODEPOSTALNANPATZCODE

Example responses:
ERROR: check_phone_number USER DOES NOT HAVE PERMISSION TO CHECK PHONE NUMBERS - |6666|0|
ERROR: check_phone_number THIS IS NOT A VALID CALL TIME - |6666|badct|
ERROR: check_phone_number NANPA options disabled, NANPA prefix data not loaded - 0|6666
ERROR: check_phone_number INVALID PHONE NUMBER LENGTH - 72755|6666
ERROR: check_phone_number INVALID PHONE NUMBER PREFIX - 72755|6666
ERROR: check_phone_number INVALID PHONE NUMBER AREACODE - 72755|6666
ERROR: check_phone_number INVALID PHONE NUMBER NANPA AREACODE PREFIX - 7275551212|6666
ERROR: check_phone_number PHONE NUMBER IN DNC - 7275551112|6666

A success response will show the results for each tz_method used(with 0 or 1 for dialable and the gmt-offset) followed by a hash"#" and then the phone information after:
AREACODE: 1|-6#PHONE: 3125551212|1||||
AREACODE: 1|-6#POSTAL: 1|-7.0#TZCODE: 0|10#NANPA: 1|-6#PHONE: 3125551212|1|81009||GST|

ERROR: NO FUNCTION SPECIFIED

## update_log_entry

updates the status of a vicidial_log or vicidial_closer_log entry

NOTE: api user for this function must have user_level set to 8 or higher and "modify leads" enabled

**Required Fields:**

| | |
|---|---|
| source - | description of what originated the API call (maximum 20 characters) |
| call_id - | either the uniqueid or the 20-character ID of the call |
| group - | either a campaign_id or an in-group group_id |
| status - | the new status for the log record to be set to |

**Notes:**
There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:
http://server/vicidial/non_agent_api.php?source=test&user=6666&pass=1234&function=update_log_entry&group=SALESLINE&call_id=Y2010309520000000234&status=SALEX

Example responses:

ERROR: update_log_entry USER DOES NOT HAVE PERMISSION TO UPDATE LOGS - 6666|0
ERROR: update_log_entry INVALID SEARCH PARAMETERS - 6666||
ERROR: update_log_entry GROUP NOT FOUND - 6666||
ERROR: update_log_entry NO RECORDS FOUND - 6666||||
ERROR: update_log_entry NO RECORDS UPDATED - 6666|TESTCAMP|M9131554060000426264|SALEX|SALEX|1347566056.399
SUCCESS: update_log_entry RECORD HAS BEEN UPDATED - 6666|6666|TESTCAMP|M9131554060000426264|SALEX|WN|1347566056.399|

# Agent API document

This document describes the functions of an API (Application Programming Interface) for the VICIDIAL Agent screen. This functionality was rather limited at first, but critical functions are constantly identified and programmed into it. There is also a Non-agent API script, that is directly in front of this section.

New scripts:
/agc/api.php - the script that is accessed to execute commands

**Required variables for all API calls:**
# user - is the API user
# pass - is the API user password
# agent_user - is the vicidial agent user whose session that you want to affect
# source - description of what originated the API call (maximum 20 characters)

**Optional variable for all API calls:**
# close_window_link - will display a link to close the window, useful if you pop up the API link in a browser window
# language - currently only works for close window link: en=English, es=Spanish

**Notes:**
To hangup the call, disposition it and then pause the agent, do the following in order:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=PAUSE

http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_hangup&value=1

http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=A

Response to calls will return either an ERROR or a SUCCESS along with an explanation. for example:
SUCCESS: external_status function set - 6666|A
ERROR: agent_user is not logged in - 6666

## *API functions for the VICIdial Agent Screen*

## version

shows version and build of the API, along with the date/time

**Values:**
NONE

Example URL:
http://server/agc/api.php?function=version

Example responses:
VERSION: 2.0.5-2|BUILD: 90116-1229|DATE: 2009-01-15 14:59:33|EPOCH: 1222020803

## webserver

shows version and build of the API, along with the date/time

**Values:**
NONE

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&function=webserver

Example responses:
Webserver Data:
set.timezone: America/New_York
abbr.timezone: EDT
dst.timezone: 1
uname: Linux dev-db 2.6.34.8-0.2-default #1 SMP 2011-04-06 18:11:26 +0200 x86_64
host name: dev-db
server name: www.vicidial.org
php version: 5.3.3
apache version: Apache/2.2.15 (Linux/SUSE)
apache processes: 13
system loadavg: 0.06
disk_free_space: 444174315520
date.timezone: America/New_York
max_execution_time: 360
max_input_time: 360
memory_limit: 128M
post_max_size: 48M
upload_max_filesize: 42M
default_socket_timeout: 360

## external_hangup

Hangs up the current customer call on the agent screen

**Values:** (value)
1 - the only valid value for this function

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_hangup&value=1

Example responses:
ERROR: external_hangup not valid - 1|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
SUCCESS: external_hangup function set - 1|6666

## external_status

Sets the status of the current customer call on the agent dispotion screen

| **Values:** | (value) |
|---|---|
| value - | Any valid status in the VICIDIAL system will work for this function |
| callback_datetime - REQUIRED | YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. if callback is set and status is flagged as a scheduled callback |
| callback_type - | USERONLY or ANYONE, default is ANYONE |
| callback_comments - | Optional comments to appear when the callback is called back, must be less than 200 characters in length |
| qm_dispo_code - | Option callstatus code used if QM is enabled |

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=A
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=CALLBK&callback_datetime=2012-01-25+12:00:00&callback_type=USERONLY&callback_comments=callback+comments+go+here&qm_dispo_code=1234

Example responses:
ERROR: external_status not valid - A|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
SUCCESS: external_status function set - A|6666

## external_pause

Pauses or Resumes the agent. If a Pause and the agent is on a live call will pause after the live call is dispositioned

| **Values:** | (value) |
|---|---|
| PAUSE - | Pauses the agent session |
| RESUME - | Resumes the agent session |

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=PAUSE

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=RESUME

Example responses:
ERROR: external_pause not valid - PAUSE|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
SUCCESS: external_pause function set - PAUSE|1232020456|6666

## logout

Logs the agent out of the agent interface. If the agent is on a live call, will logout after the live call is dispositioned

**Values:** (value)
LOGOUT - Logout the agent session

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=logout&value=LOGOUT

Example responses:
ERROR: logout not valid - PAUSE|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
SUCCESS: logout function set - LOGOUT|1232020456|6666

## external_dial

Places a manual dial phone call on the agent screen, you can define whether to search for the lead in the existing database or not and you can define the phone_code and the number to dial. This action will pause the agent after their current call, enter in the information to place the call, and dialing the call on the agent screen.

**Values:**

| | |
|---|---|
| value - | Any valid phone number (7275551212) |
| lead_id - | Any valid lead_id from the system(either value or lead_id are required) if both are defined, lead_id will override value |
| phone_code - | Any valid phone country code (1 for USA/Canada, 44 for UK, etc...) |
| search - | YES - perform a search in the campaign-defined vicidial_list list for this phone number and bring up that lead<br>NO - do not search, create a new vicidial_list record for the call |
| preview - | YES - preview the lead in the vicidial screen without dialing<br>NO - do not preview the lead, place call immediately |
| focus - | YES - change the focus of the screen to the vicidial.php agent interface, brings up an alert in the browser window<br>NO - do not change focus |
| vendor_id - | OPTIONAL, any valid Vendor lead code |
| dial_prefix - | OPTIONAL, any dial prefix that you want to add to the beginning of the dial string for this call |

group_alias - OPTIONAL, the outbound callerID(from an existing group-alias) that you want to use for this call
vtiger_callback - OPTIONAL, YES or NO, will lookup the phone number and Vtiger account ID from the provided Event ID
alt_user - OPTIONAL, instead of agent_user, this is to lookup the agent_user using the vicidial_users.custom_three field
alt_dial - OPTIONAL, if using lead_id you can set this flag to dial the ALT number or the ADDR3 number

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES&dial_prefix=88&group_alias=DEFAULT

Example responses:
ERROR: external_dial not valid - 7275551212|1|YES|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: agent_user is not allowed to place manual dial calls - 6666
ERROR: caller_id_number from group_alias is not valid - 6666|TESTING|123
ERROR: group_alias is not valid - 6666|TESTING
ERROR: vtiger callback activity does not exist in vtiger system - 12345
ERROR: phone_number is already in this agents manual dial queue - 6666|7275551211
ERROR: lead_id is not valid - 6666|1234567
ERROR: phone number is not valid - 6666||1234567|
SUCCESS: external_dial function set - 7275551212|6666|1|YES|NO|YES|123456|1232020456|9|TESTING|7275551211|

## preview_dial_action

sends a SKIP, DIALONLY, ALTDIAL, ADR3DIAL or FINISH when a lead is being previewed or in Manual Alt Dial

**Values**: (value)
agent_user - REQUIRED alphanumeric string for active agent user
value - One of the following actions (SKIP, DIALONLY, ALTDIAL, ADR3DIAL or FINISH)

Example URLs:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=preview_dial_action&value=SKIP

Responses:
ERROR: preview_dial_action not valid - 7275551212|1|YES|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: agent_user is not allowed to place manual dial calls - 6666
ERROR: preview dialing not allowed on this campaign - 6666|TESTING|DISABLED
ERROR: preview dial skipping not allowed on this campaign - 6666|TESTING|PREVIEW_ONLY
ERROR: alt number dialing not allowed on this campaign - 6666|TESTING|N
SUCCESS: preview_dial_action function set – DIALONLY|6666|DIALONLY

## external_add_lead

Adds a lead in the manual dial list of the campaign for logged-in agent. A much simplified add lead function compared to the Non-Agent API function

**Values:**

agent_user - REQUIRED alphanumeric string for agent user
dnc_check - OPTIONAL - Check for number against system DNC
campaign_dnc_check - OPTIONAL - Check for number against campaign DNC from the agent's campaign
LEAD DATA (must populate at least one)
NOTE: Only fields that are specified in the API call will be modified

address1
address2
address3
alt_phone
city
comments
country_code
date_of_birth
email
first_name
gender
gmt_offset_now
last_name
middle_initial
phone_number
phone_code
postal_code
province
security_phrase
source_id
state
title
vendor_lead_code
rank
owner

Example URL:

http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_add_lead&phone_number=7275551212&phone_code=1&first_name=Bob&last_name=Smith=NO&dnc_check=YES

Example responses:

ERROR: external_add_lead not valid - 7275551212|1|6666|
ERROR: no user found - 6666
ERROR: lead insertion failed - 7275551212|TESTCAMP|101|6666
ERROR: add_lead PHONE NUMBER IN DNC - 7275551212|6666
ERROR: add_lead PHONE NUMBER IN CAMPAIGN DNC - 7275551212|TESTCAMP|6666

ERROR: campaign manual dial list undefined - 7275551212|TESTCAMP|6666
ERROR: agent_user is not logged in - 6666
SUCCESS: lead added - 7275551212|TESTCAMP|101|123456|6666

## change_ingroups

This function will change the selected in-groups for an agent that is logged into a campaign that allows for inbound calls to be handled. Allows the selected in-groups for an agent to be changed while they are logged-in to the ViciDial Agent screen only. Once changed in this way, the agent would need to log out and back in to be able to select in-groups themselves(If Agent Choose In-Groups is enabled for that user). The blended checkbox can also be changed using this function. The API user performing this function must have vicidial_users.change_agent_campaign = 1.

**Values:**

| | |
|---|---|
| value - | CHANGE - will change all in-groups to those defined in ingroup_choices |
| REMOVE - | will only remove the listed in-groups |
| ADD - | will only add the listed in-groups |
| blended - | YES - set the agent to take outbound auto-dialed calls (not applicable in MANUAL and INBOUND_MAN dial method campaigns) |
| | NO - set the agent to only take inbound calls |
| ingroup_choices - | OPTIONAL, a space-delimited(use plusses + in the URL) list of in-groups to allow the agent to take calls from, example: " TEST_IN2 SALESLINE TRAINING_IN -" |
| set_as_default - | OPTIONAL, YES or NO - overwrites the settings for the agent in the user modification screen, default is NO |

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=CHANGE&set_as_default=YES&blended=YES&ingroup_choices=+TEST_IN+SALESLINE+FAKE_IN+-
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=REMOVE&blended=NO&ingroup_choices=+TEST_IN2+TEST_IN4+-
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=ADD&blended=NO&ingroup_choices=+TEST_IN2+-

Example responses:
ERROR: change_ingroups not valid - N| TEST_IN SALESLINE -
ERROR: agent_user is not logged in - 6666
ERROR: campaign does not allow inbound calls - 6666
ERROR: user is not allowed to change agent in-groups - 6666|TESTING|123
ERROR: campaign dial_method does not allow outbound autodial - 6666|TESTING
ERROR: ingroup does not exist - FAKE_IN| TEST_IN FAKE_IN SALESLINE -
ERROR: ingroup_choices are required for ADD and REMOVE values - ADD|
SUCCESS: change_ingroups function set - YES| TEST_IN SALESLINE -|6666

## update_fields

Updates the fields that are specified with the values. This will update the data that is on the agent's screen in the customer information section.

**Values:** (value)
agent_user - REQUIRED alphanumeric string for agent user LEAD DATA (must populate at least one)
NOTE: Only fields that are specified in the API call will be modified

address1
address2
address3
alt_phone
city
comments
country_code
date_of_birth
email
first_name
gender
gmt_offset_now
last_name
middle_initial
phone_number
phone_code
postal_code
province
security_phrase
source_id
state
title
vendor_lead_code
rank
owner

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&function=update_fields&agent_user=6666&vendor_lead_code=1234567&address1=

Example responses:
ERROR: update_fields not valid - 6666
ERROR: agent_user is not logged in - 6666
ERROR: user is not allowed to modify lead information - 6666|1234
ERROR: agent_user does not have a lead on their screen - 6666|1234
ERROR: no fields have been defined - 6666
SUCCESS: update_fields lead updated - 6666|1234|87498|vendor_lead_code='1234567',address1=''

## set_timer_action

Updates the fields that are specified with the values. This will update the data that is on the agent's screen in the customer information section.

**Values:** (value)

agent_user - REQUIRED, alphanumeric string for agent user
value - REQUIRED, one of these choices:
'NONE','WEBFORM','WEBFORM2','D1_DIAL','D2_DIAL','D3_DIAL',
'D4_DIAL','D5_DIAL','MESSAGE_ONLY'
notes - Optional, the message to be displayed with the timer action
rank - Optional, the number of seconds into the call to display

Example URL:
http://server/agc/api.php?
source=test&user=6666&pass=1234&function=set_timer_action&agent_user=6666&value=MESSAGE_ONLY&notes=test+message&rank=15

Example responses:
ERROR: set_timer_action not valid - 6666
ERROR: agent_user is not logged in - 6666
ERROR: user is not allowed to modify campaign settings - 6666|1234
SUCCESS: set_timer_action lead updated - 6666|1234|MESSAGE_ONLY|test message|15

## st_login_log

Looks up the vicidial_users.custom_three field(as "agentId") to associate with a vicidial user ID. If found it will populate the custom_four field with a "teamId" value, then output the vicidial user ID

**Values:** (value)
value - REQUIRED alphanumeric string for CRM AgentID
vendor_id - REQUIRED alphanumeric string for CRM TeamID

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_login_log&value=876543&vendor_id=207

Example responses:
ERROR: st_login_log not valid - 6666|207
ERROR: no user found - 6666
SUCCESS: st_login_log user found - 6666

## st_get_agent_active_lead

Looks up the vicidial_users.custom_three field(as "agentId") to associate with a vicidial user ID. If found it will output the active lead_id and phone number, vendor_lead_code, province, security_phrase and source_id fields.

**Values:** (value)
value - REQUIRED alphanumeric string for CRM AgentID
vendor_id - REQUIRED alphanumeric string for CRM TeamID

Example URL:
http://server/agc/api.php?
source=test&user=6666&pass=1234&function=st_get_agent_active_lead&value=876543&vendor_id=207

Example responses:
ERROR: st_get_agent_active_lead not valid - 6666|207
ERROR: no user found - 6666
ERROR: user not logged in - 6666
ERROR: no active lead found - 6666
SUCCESS: st_get_agent_active_lead lead found - 6666|7275551212|123456|9987-1234765|SK|WILLIAMS|JUH764AJJJ9

## ra_call_control

Allows for remote agent call control: hangup/transfer calls being handled by remote agents, also options for recording a disposition and call length

| **Values:** | (value) |
|---|---|
| value - | REQUIRED, The call ID of the call as received as CallerIDname field or a special SIP header, i.e. Y0315201639000402027 |
| agent_user - | REQUIRED, alphanumeric string for remote agent user |
| stage - | REQUIRED, one of these choices: 'HANGUP','EXTENSIONTRANSFER','INGROUPTRANSFER' |
| ingroup_choices - | OPTIONAL, only required if INGROUPTRANSFER stage is used, must be a single active in-group, reserved option of "DEFAULTINGROUP" can be used to send the call to the default in-group for the in-group or campaign that originated the call to the remote agent |
| phone_number - | OPTIONAL, only required if EXTENSIONTRANSFER stage is used, must be a full number when dialed that will dial through the default context |
| status - | OPTIONAL, status of the call, maximum of 6 characters, if not set, status will be RAXFER |

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1028&function=ra_call_control&stage=INGROUPTRANSFER&ingroup_choices=DEFAULTINGROUP&value=Y0316001655000402028

Example responses:
ERROR: ra_call_control not valid - Y0315201639000402027|6666|INGROUPTRANSFER
ERROR: no user found - 6666
ERROR: user not logged in - 6666
ERROR: no active call found - Y0315201639000402027
ERROR: phone_number is not valid - 9
ERROR: ingroup is not valid - TESTINGROUP
ERROR: stage is not valid - XYZ
SUCCESS: ra_call_control transferred - 6666|Y0315201639000402027|SALESLINE
SUCCESS: ra_call_control hungup - 6666|Y0315201639000402027|HANGUP

## send_dtmf

Sends dtmf signal string to agent's session

**Values:** (value) only valid DTMF characters with these replacements:
P = # (pound or hash)
S = * (star)

Q = (one second of silence)

Example URL:
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=send_dtmf&value=QQQQ1234SQQQQQ6654P

Example responses:
ERROR: send_dtmf not valid - QQ|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
SUCCESS: send_dtmf function set - QQQQ1234SQQQQQ6654P|6666

## park_call

sends command to park customer or grab customer out of park

**Values:** (value)
value - REQUIRED, choices are below
PARK_CUSTOMER - send customer to the park extension as defined in the campaign the agent is logged into
GRAB_CUSTOMER - grab customer from the park extension and send them to the agent session
PARK_IVR_CUSTOMER - send customer to the park ivr as defined in the campaign the agent is logged into, customer will come back after finishing IVR
GRAB_IVR_CUSTOMER - grab customer from the park ivr and send them to the agent session

Example URL:
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_CUSTOMER
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_CUSTOMER
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_IVR_CUSTOMER
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_IVR_CUSTOMER

Example responses:
ERROR: park_call not valid - PARK_CUSTOMER|6666
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: agent_user does not have a lead on their screen - 6666
SUCCESS: park_call function set - PARK_CUSTOMER|6666

## transfer_conference

sends several commands related to the agent transfer-conf frame

**Values:** (value)
value - REQUIRED, choices are below
HANGUP_XFER - hangup the third party line
HANGUP_BOTH - hangup customer and third party line

BLIND_TRANSFER - send a call to a defined phone number
LEAVE_VM - blind transfer customer to the campaign-defined voicemail message
LOCAL_CLOSER - send call to another ViciDial agent, must have in-group, optional phone_number field for AGENTDIRECT agent
DIAL_WITH_CUSTOMER - 3-way call with customer on the line
PARK_CUSTOMER_DIAL - send customer to park and place a call to a third party
LEAVE_3WAY_CALL - leave customer and third party in conference and go to the disposition screen

phone_number - OPTIONAL/REQUIRED, required for any transfer or dial value
ingroup_choices - OPTIONAL/REQUIRED, required for local_closer and consultative transfers, must be a single active in-group, reserved option of "DEFAULTINGROUP" can be used to select the default in-group for the in-group or campaign that the call originated from
consultative - OPTIONAL, when you want to do a consultative transfer with your customer and another ViciDial agent, 'YES' and 'NO' are valid options, you can only use this with DIAL_WITH_CUSTOMER or PARK_CUSTOMER_DIAL
dial_override - OPTIONAL, dials exactly the phone number specified with no campaign-defined phone code or prefix
group_alias - OPTIONAL, defines what caller ID number to use when doing DIAL_WITH_CUSTOMER or PARK_CUSTOMER_DIAL

Example URL:

http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=HANGUP_XFER
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=HANGUP_BOTH
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=BLIND_TRANSFER&phone_number=8500
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LEAVE_VM
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=DEFAULTINGROUP
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=AGENTDIRECT&phone_number=6666
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LOCAL_CLOSER&ingroup_choices=SALESLINE
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&ingroup_choices=TEST_IN3&consultative=YES
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&phone_number=8500
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=DIAL_WITH_CUSTOMER&phone_number=919998888112&dial_override=YES
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=PARK_CUSTOMER_DIAL&ingroup_choices=TEST_IN3&consultative=YES
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=LEAVE_3WAY_CALL

Example responses:
ERROR: transfer_conference not valid - QQ|6666
ERROR: value is not valid - XYZFUNCTION|6666
ERROR: no user found - 6666
ERROR: ingroup is not valid - XYZINGROUP
ERROR: agent_user is not logged in - 6666
ERROR: agent_user does not have a live call - 6666
ERROR: caller_id_number from group_alias is not valid - 6666|TESTING|123
ERROR: group_alias is not valid - 6666|TESTING
SUCCESS: transfer_conference function set - LOCAL_CLOSER|SALESLINE||YES|6666

## recording

sends a recording start/stop signal or status of agent recording

**Values:**

| | |
|---|---|
| value - | REQUIRED, choices are below |
| START - | sends a "start recording" signal to the agent screen<br>(you can have multiple recordings going at the same time) |
| STOP - | sends a "stop recording" signal to the agent screen<br>(this will stop all active recordings onthe agent screen) |
| STATUS - | displays results of active recording and agent session information<br>(returns: user\|recording_id\|filename\|server\|start_time\|agent_server\|session\|agent_status) |

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=START
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=STOP
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=recording&value=STATUS

Example responses:
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: stop recording error - 6666|||||192.168.1.5|8600051|PAUSED
SUCCESS: recording function sent - 6666|STOP||||192.168.1.5|8600051|PAUSED
SUCCESS: recording function sent - 6666|START||||192.168.1.5|8600051|PAUSED
NOTICE: not recording - 6666|||||192.168.1.5|8600051|PAUSED
NOTICE: recording active - 6666|121242|20120810-012008__6666_|192.168.1.5|2012-08-10 01:20:10|192.168.1.5|
8600051|PAUSED

## webphone_url

display or launch the webphone url for the current agent's session

**Values:** (value)
value - REQUIRED, choices are below:
DISPLAY - displays only the URL for the webphone if enabled
LAUNCH - redirects the url to the webphone url to launch it

Example URL:
http://server/agc/api.php?

source=test&user=6666&pass=1234&agent_user=1000&function=webphone_url&value=DISPLAY
http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=webphone_url&value=LAUNCH

Example responses:
<if function is successful, the URL will be displayed or launched>
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: webphone_url not valid - 6666|DISPLAY
ERROR: webphone_url error - webphone url is empty - 6666
ERROR: webphone_url error - no session data - 6666

## call_agent

send a call to connect the agent to their session

**Values:** (value)
value - REQUIRED, choices are below:
CALL - places call from the agent session to the agent's phone

NOTES: this function is not designed to work with on-hook agents

Example URL:
http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=call_agent&value=CALL

Example responses:
ERROR: no user found - 6666
ERROR: agent_user is not logged in - 6666
ERROR: call_agent not valid - 6666|CALL
ERROR: call_agent error - entry is empty - 6666
ERROR: call_agent error - no session data - 6666
SUCCESS: call_agent function sent - 6666

## *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.

 ©2014 Vicidial Group

# GLOSSARY

**Agent** – Another name for a user on VICIdial, it also implies they do not have administrator access

**AGI** - (Asterisk Gateway Interface) In VICIdial AGI scripts are designed to allow application level control of selected features, and increasing their existing level of functionality.

**API** - (application programming interface) These can be set up to automatically execute commands that are generally handled by the agent or admin. Agent APIs deal with commands the agent would normally handle, while Non-agent APIs refer to administrator functions.

**Blended** - allowing both inbound and outbound calls

**Broadcast dialing** - a campaign that places calls without the aid of human agents. When the recipient answers a message is played and then call is disconnected. This is used for announcement recordings to be played to customers that have already opted to receive the call (school closings, prescription reminders, etc.). Also known as "robo-dialing"

**Call menu -** an automated attendant that plays an announcement to the caller, offering several routing choices based on which button they presses. This is also know as an IVR (interactive voice response).

**Call times** - In VICIdial the outbound call time is relative to the local time zone of the lead being called. For example, if the campaign's call time was set to "9am-5pm", a lead would not be called until it was at least 9am local time; regardless of what time zone they lived in. For inbound calls, the call time is based on the server time. Anything outside of that time is considered "after hours".

**Campaign** - the basic module of VICIdial, allowing for outbound calls. A user will need to log into a campaign to be able to place or receive phone calls.

**Carrier** - The telephony provider that connects calls to, and receives calls from, the public telephone network.

**Chanunavailable** - this indicates calls the dialer intended to place, but didn't have enough lines available to send it to the carrier.

**CID -** (caller identification) The phone number displayed on an outbound phone call

**Closer** - The agent that receives a transferred call from another user (the fronter) in VICIdial.

**CNAM** - (Caller ID Name) The name displayed on the recipient's caller ID. While the caller ID number is sent along with the call, the caller ID name is supplied by the receiving party's carrier. If the recipient carrier's database is not updated frequently CNAM can display a previous owner for the phone number. Sometimes this may even display the state or "unknown" if the phone number doesn't exist in their database at all. Canada is the only exception, allowing carriers placing the call to send both caller ID number & name.

**CONGESTION** - a carrier message indicating the dialer sent calls to the carrier that they were unable to place.

**CRM -** (Customer Relationship Management or Customer Resource Management) Any system designed for storing and handling customer interactions and data. The custom fields feature allows you to create a wide array of new tables to retain customer information. They allow it to perform most CRM features. VICIdial can integrate directly with any web-based CRM, using a URL string to post data.

**DID** - (Direct Inward Dialing) A phone number, provided by a carrier, so the dialer can receive incoming calls. Also called DDI (Direct Dial In) in Europe and Australia.

**Disposition** - The final status placed on a lead. (see "status")

**DNC** - (Do Not Call) Customer designated to not be called back, either due to personal request or having been placed on the National Do Not Call list.

**DNIS** - (Dialed Number Identification Service) a carrier service that indicates which, of the many possible phone numbers a company may own, was dialed by the customer to reach them.

**Filter** - a script designed to use one or more set criteria to dial certain phone numbers that reside in a much larger list. For example, a list may contain thousands of leads for people spread across the country. A filter would allow you to dial only men named "Matthew" in one particular town.

**Fronter** - The user that transfers a phone call to another agent (the closer) in VICIdial.

**Hotkeys** - A feature in VICIdial that allows the agent to disposition calls more quickly. It is enabled in the campaign and statuses are assigned a preset number (0-9). The agent mouses over the "hotkeys" button on their screen and selects the corresponding number. This saves the time of going through several steps, and they are immediately available to take another call.

**IAX2** - (Inter-Asterisk eXchange) a voice over IP protocol native to Asterisk based systems. This is sometimes preferable to SIP, because it can navigate network firewalls more easily.

**Ingroup** - a queue, staffed by agents, allowing them to receive inbound calls. The Ingroup must be attached to a campaign, to allow the agents to log into it.

**Hopper** - Where the dialer temporarily places the leads, just prior to dialing them. Rather than pulling leads from the database one at a time, which is resource intensive, every 60 seconds the dialer grabs a group of leads. Once a lead is selected, the hopper script runs all of the system checks (call time, filter, DNC list, etc.) before placing it in the hopper to be dialed.

**LIDB** - (Line Information DataBase) used in the US and Canada to store and retrieve caller ID records.

**List ID Override** - Several campaign features can be overridden on a list by list basis. These features are: agent script, campaign caller ID, answering machine message, drop inbound group, web form, web form 2, and transfer-conf 1-5. If any of these are set on the list they will supersede the campaign's setting. Once a list override has been enabled, the word "OVERRIDE" will appear (in red print) next to the corresponding campaign setting.

**Manual dialing/click to dial** - This is the MANUAL campaign dial method. The leads have been preloaded into the dialer and selected for the campaign. The agent clicks a "dial" button on their interface to place a call to the lead the system selected for them. In this dial method the calls are placed one at a time. The agent initiates the call, although they have no choice regarding who is dialed.

**Phone Code Override** - This is found on the web-based lead loader and allows you to specify the phone code (also known as country code) for an entire list of leads, rather than on each one individually.

**Phone Number Prefix** - In the US, this is the set of 3 digits that immediately follows the area code. In the example phone number "123-456-7890", the telephone prefix would be "456".

**Phone registration** – n order for phone to work with VICIdial, it needs to be registered to a phone extension at all times. First, the phone extension must be built in VICIdial (Admin-Phones), for the phone to connect with. Then the software or hardware phone will require specific information to register (IP address, registration password, extension, VOIP protocol, etc.), depending on the type of phone. Once the phone registration has successfully completed, the agent can log into the system to place and receive calls.

**Predictive dialing/adaptive dialing** - This uses an algorithm and administrator configured settings to dynamically increase or decrease the number of calls placed per agent throughout the day. Because this dial method is designed to adjust as it dials, it requires less supervision than ratio dialing.

**Press 1** - a campaign that engages the recipient to "press 1" to continue (or agree to) the call, and is then transferred to an agent. This is type of call is currently illegal in the US unless it is placed business to business, for political, or not-for-profit purposes. This is known in VICIdial as a "survey campaign".

**Ratio dialing** – Using this dial method, the dialer allocates a set number of lines per agent. The dialer then constantly places calls on the allotted lines. For example, with a dial method of RATIO, and a dial level of 2, the system will constantly place 2 calls per logged in agent.

**Remote agents** - In terms of VICIdial, this is any user that is connected to the system by phone only, and does not have a computer. This was originally designed for users out in the field, that may only be connected over a mobile phone or hardline. The dialer can still send them calls, but they don't have any of the call control functions offered in the agent interface.

**Ring-all** - An ingroup setting that allows all of the agents' phones to ring, rather than sending the call to just one of them. The first agent to answer their phone receives the call.

**Robo-dialing** - a campaign that places calls without the aid of human agents. When the recipient answers a message is played and then call is disconnected. This is used for announcement recordings to be played to customers that have already opted to receive the call (school closings, prescription reminders, etc.). Also known as "Broadcast dialing"

**Safe Harbor message** - Named because of its designed intent to comply with US FTC Safe-Harbor regulations (see "FTC Safe Harbor Regulations"). The second provision states that if a call is dropped, the caller must play a message stating the name of your company, why you are calling, and a phone

phone number where the company can be reached back.

**SIP** - (Session Initiated Protocol) a specific VOIP protocol. VICIdial is capable of using either SIP or IAX2 protocols to send voice traffic.

**Status** - This is the system state of the lead. The system dynamically changes the status throughout an active call. For example, when the call is placed it's statused as DIALING, but once connected to a customer, the system will change it to INCALL. Once the call has ended, the final status placed on the lead is known as the disposition.

**Survey dialing** - a campaign that engages the recipient to "press 1" to continue (or agree to) the call, and is then transferred to an agent. This is type of call is currently illegal in the US unless it is placed business to business, for political, or not-for-profit purposes. This is also known as "Press 1" dialing.

**trunk** - A connection that allows calls to, and from, the dialer. A "trunk" generally refers to the connection with the carrier, but it can also include any other system that would send or receive calls with VICIdial.

**TTS** - (Text To Speech) VICIdial integrates with Cepstral Text To Speech, allowing written data to be spoken aloud over the phone.

**URL** - (Uniform Resource Locator) This is the specific character string displayed on top of a web browser, inside an address bar. This is usually designed to allow someone to access a resource of information on the internet or private network. Since VICIdial is web-based, it can also be used to dynamically post information and integrate with other web-based systems (CRM, billing program, shipping & receiving software, etc.).

**User vs Phone** - This can be confusing to new users of VICIdial. The phone (either softphone or hardware phone) is registered to a phone extension in the system. That phone extension is then assigned to that desk phone or PC, it doesn't move around (unless re-registered). The user represents a unique person and they can login from any registered phone. This why the dialer requires 2 separate logins for the agent. First the phone, then the user. So that understands where and whom it will be sending the phone calls.

**VDAD** - (ViciDial Auto-Dial) When this is listed as the "user" for a call, it means the system handled it and it was never sent to an agent.

**VOIP** - (Voice Over Internet Protocol) The delivery of voice communication over a network (usually the internet), rather than using the Public Switched Telephone Network (PSTN).

**Web form** - A web page that allows a user to enter data that is sent to a server for processing. IN the case of VICIdial, the Web Form & Web Form 2 buttons can launch different URL scripts containing static or variable data for performing a multitude of tasks. Generally this is the most common way for agents to send data to another web-based system (CRM, billing program, shipping & receiving software, etc.).

**THIS IS THE FREE SAMPLE VERSION OF THE MANAGER MANUAL.**

**IF YOU WOULD LIKE 256 MORE PAGES OF CONTENT AS WELL AS FULL COLOR SCREENSHOTS, PLEASE GO TO** HTTP://WWW.VICIDIAL.ORG **TO PURCHASE THE FULL VERSION OF THE VICIDIAL MANAGER MANUAL AND TO HELP SUPPORT THE PROJECT**