



Manager Manual

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1. Introduction

This manual is meant as a resource for Contact Center Managers and System Administrators to better understand how Elision Dialer 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 Elision Dialer and it's management interfaces. It is expected that you have thoroughly read through the Elision Dialer Agent manual before reading this manual.

1. Who is a Elision Dialer manager?

A Elision Dialer manager is a person who adds, modifies or deletes users, campaigns, lists, inbound groups(or queues), DIDs, Call Menus(or IVRs), add voicemail boxes, configure phones and manage the music-on-hold and audio prompts in the system as well as other items within the Elision Dialer system. They also control the call pacing and other campaign settings while a campaign is running in the contact centre. 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 centre effectively.

1. HOW DO THE MANAGER ADMINISTRATION SCREENS WORK?

The Elision Dialer manager administration page gives links to modify and monitor many aspects of how the Elision Dialer systems run. From here you can view real-time reports and modify many kinds of settings. The screen is a web page and can be accessed from almost any web browser and smart phones.

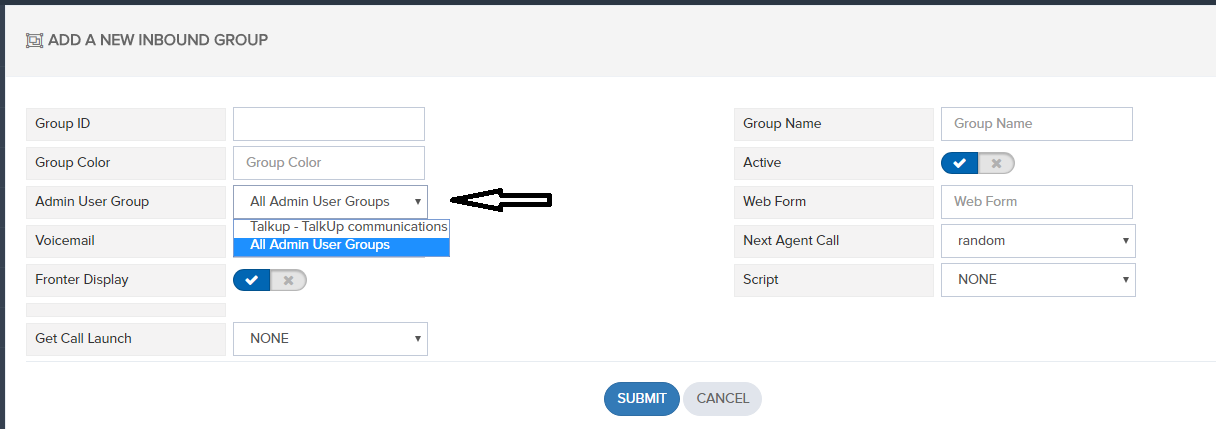
The next section of this manual contains tutorials that will show you step-by-step how to set up and use the Elision Dialer Contact Centre Suite. The section following the tutorial section will go into detail about how most of the manager features work with a description of every screen in the manager sections of the Elision Dialer management interface.

1. Important

## Pre-requisites

Please make sure Campaign, list, inbound groups, users you create have following two requirements full filled.

1. All IDs should starts with prefix of your account id ACCIDXXXX. For example 405XXXX where 405 is your account id(ACCID) provided by Elision and XXXX are any arbitrary number you would like.
2. Change the “Admin User Group” from “All Admin User Group” to your company name as shown below.



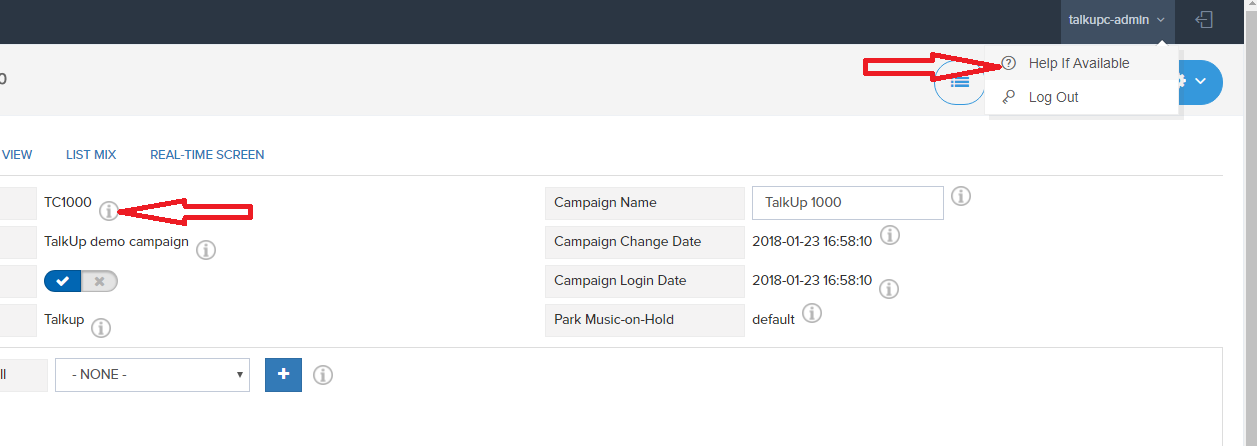
**Figure 1 important information**

**Otherwise your campaigns, lists, inbound groups; users will be deleted automatically daily.**

This information will not be repeated in any other section.

## Help

Help is built into the admin panel and can be accessible by clicking your username and press “Help if available” as shown in below figure 2, then “i” symbol will appear wherever help text is available.



**Figure 2 Finding help**

1. Tutorial

## CREATE A CAMPAIGN, LOAD LEADS, ADD A LIST, AND START DIALING.

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

### Create Manual Campaign

1. Click on the CAMPAIGNS link at the left of the page to get to the CAMPAIGNS section and click on the ADD CAMPAIGN icon on the right hand upper corner.
2. We will set the fields in the ADD A NEW CAMPAIGN form to the following values:

* Campaign ID: 4051001
* Campaign Name: TESTCAMP
* Description : Test campaign for Elision Dialer
* Admin User Group : Your company
* 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 Elision Dialer CAMPAIGNS section of this manual>

1. Click submit to create this new campaign
2. 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.

### Add List

1. You now need to create a LIST to import your customer leads to. Click on the ADD A NEW LIST link.
2. For this tutorial we will fill in the following add list fields with these values:

* List ID: 4051001
* List Name: test list
* Campaign: TESTCAMP
* Active: Y

1. Click submit to create the LIST.

### Load Leads

1. 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 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.

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 ElisionDialer release(test\_ElisionDialer \_lead\_file.txt):

100001|10001|107|1|7275551213|MR|JOHN|Q|PUBLIC|249 MUNDON [ROAD|MALDON|FL||||33709|](mailto:ROAD%7CMALDON%7CFL%7C%7C%7C%7C33709%7CUSA%7CM%7C1970-01-01%7C7275551212%7Ctest@test.com)

[USA|M|1970-01-01|7275551212|test@test.com](mailto:ROAD%7CMALDON%7CFL%7C%7C%7C%7C33709%7CUSA%7CM%7C1970-01-01%7C7275551212%7Ctest@test.com)|nothing|COMMENTS|1|Southeast

NOTE: 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.

1. Click on the “Choose file” button on the lead import page and select the file to import on your computer then click submit.
2. The “List ID Override” pull down indicates which if the existing lists you will be import the leads onto.
3. If you are using the standard Elision Dialer field order as mentioned above, then you should select the “Standard Elision Dialer ” file layout option. If you need to map the fields before importing the leads then you should select the “Custom Layout” option.
4. 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.

1. “USA-Canada Check” will verify the “Phone Number” field to ensure the area code is valid for either the US or Canada. Default is set not to validate.
2. 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.
3. 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.
4. 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.
5. Right hand upper corner of the screen you should see a “gear wheel” icon and select “Hopper Leads” to see the leads that are loaded into the hopper to be dialed.

### Start Dialling

1. Now that you have leads in the hopper, you should have your agent log into the Elision Dialer agent application: https://demo.elisiontec.com /elision-dialer/agent/index.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 for example agent/index.php?pl=phone1&pp=test

1. 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 Elision) then click submit.
2. You will then need to enter in your agent username and password and select your campaign (TESTCAMP) then click submit.
3. You should now be logged in as agent and your phone should ring to place you into the Elision Dialer session
4. 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.
5. The customer's information should now appear and you will hear the call ringing.
6. 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.
7. After placing a live call you can now click on the LOGOUT link in the top right corner of your Elision Dialer client page to properly log out of the system. At this time your phone connection should be hung-up.
8. 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” to Yes, 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.

### 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 Elision Dialer servers. For example, if you have 24 channels on it and you have 6 agents that will be dialling on that server for this shift; you should set this field to “4.0” for most efficient possible dialling in Predictive mode.
6. Set the “Latest Server Time” to “2100” for a 9PM stop time in your call centre. 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 dialling, you should log in to the Elision Dialer agent application, wait for the phone to ring and click on the “RESUME” button to start the dialer.

### REAL TIME REPORT

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

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

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. Our recommendation is more than 10 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.

1. CREATE AN INBOUND-GROUP, POINT A DID AT IT, AND TAKE CALLS

In the last tutorial you just tested an outbound campaign and now you want to have your company's 1800 number pointed to Elision Dialer so that you can have Agents answering inbound phone calls while also receiving caller ID information.

## CREATING INBOUND GROUP OR CALL QUEUE

1. To take inbound numbers into Elision Dialer you will need to first setup an inbound group (or in-group) in the Elision Dialer admin page. Go to the INBOUND section of the Elision Dialer admin page, Show In-Groups and click on the ADD A NEW IN-GROUP icon.
2. For this tutorial we will use the following values for the fields on the NEW IN-GROUP form:

* Group ID: 4051002
* Group Name: Primary Sales Line
* Group Color: red
* Active: Y
* Admin User Group: Your company
* 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--

1. 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.

## CREATING A DID OR INBOUND NUMBER

1. 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.
2. On the Create DID page you will put the following values in:

* DID Extension: 0712345678
* DID Description: Inbound 1800 number Answer point

1. 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: 4051002 (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 - will attempt to lookup the phone number by the CallerID in only one specified list
* CIDLOOKUPRC - will attempt to lookup the phone number by the CallerID in all of the lists that belong to the specified campaign
* CLOSER -Closer calls from ELision Dialer 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

## Create an Inbound Campaign

1. 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.
2. For this tutorial we will use the following for the fields on the NEW CAMPAIGN form:

* Campaign ID: 4051003
* Campaign Name: Closer and inbound campaign
* Admin User Group : Your company
* 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).

1. 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”.
2. Click submit and scroll down to the "Allowed Inbound Groups" section and check the box for 4051002 then click the SUBMIT button to commit the changes.
3. 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.
4. Now that you have your in-group set up, you should have your agent log into the Elision Dialer agent interface.
5. 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 then click submit.
6. You will then need to enter in your agent username and password and select your campaign (4051003) then click submit.
7. You should now be logged in and your phone should ring to place you into your Elision Dialer session
8. 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 4051002 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.
9. 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.
10. When a call comes into the 1800 number, the customer's caller ID and possibly name or location should appear in the Elision Dialer agent screen fields as well as the status bar at the top changing to the colour red (which we set in the in-group screen earlier).
11. 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.
12. After receiving and processing a live call you can now click on the LOGOUT link in the top right corner of your Elision Dialer client page to properly log out of the system. At this time your phone connection should be hung-up automatically.
13. SET UP THE AUDIO STORE, UPLOAD AN AUDIO PROMPT AND RECORD A PROMPT OVER THE PHONE

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

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

1. Click on the new “Audio Store” link in the sidebar on the left side of the screen.
2. On the Audio Store page you can upload audio files from your computer to the Elision Dialer system, as well as see the current audio files that are in the system. We recommend using only PCM 16bit 8k WAV files (i.e. demo.wav). After two minutes, the uploaded audio file should be copied to all of your Elision Dialer servers that are active on this system.
3. To record an audio prompt from a phone that is registered on the system, dial 8168 and following the instructions to recording a message (the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001). After two minutes this recording should be available in the Audio Store.
4. Now when you go to a Call Menu, In-Group, Music-On-Hold or another page that has a field with an “audio chooser” link next to it, you will be able to see the available audio prompts, sort them by filename, size and age, play the audio prompts to hear what they sound like and click on a prompt to fill that field with the prompt that you selected. When first opening the “audio chooser” the newest upload files will be at the top.
5. SET UP YOUR OUTBOUND CAMPAIGN TO DO ANSWERING MACHINE DETECTION(AMD)

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

1. Open the Elision Dialer admin web site and go to the Campaign Detail modification page for the TESTCAMP campaign.
2. To activate AMD you will need to change the "Campaign VDAD exten" to 8369 to have calls go through the AMD-enabled call processor.

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

1. If you want to leave a message on the calls that are detected to be Answering Machines then you will switch the "AMD send to vm exten" field to Y and enter into the "Answering Machine Message" field the a pre-recorded audio prompt filename to play to the Answering Machine while it is recording. For this tutorial we will use vm-goodbye, or you can choose another prompt from the “audio chooser” link next to the field. You will need to make sure that you have recorded a customized audio recording to be played to put in this field, we often recommend having the message play twice (recording the message twice) if it is not too long to make sure the customer can listen to the entire message at least once. The message should be recorded in GSM format 8k-8bit mono or WAV format PCM 8k-16bit mono. Another option for this message is to use a Elision Dialer -attached phone to quickly record a prompt by dialing 8168 and following the instructions to recording a message (the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001) and simply place the prompt ID (like 85100008) into the "Answering Machine Message" field directly, or selecting it from the “audio chooser” link. For more information on the Audio Store and using custom audio prompts, see Tutorial 7.4 above.
2. SET UP AN AUTO-DIAL CAMPAIGN TO DIAL WITHOUT ANY LIVE AGENTS AND PLAY A MESSAGE

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

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

### PLAY MESSAGE IMMEDIATELY –

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

### PLAY MESSAGE AFTER WAITING A SET NUMBER OF SECONDS –

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

### PLAY MESSAGE AFTER WAITING FOR SILENCE ON THE LINE –

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

### FULL ANSWERING MACHINE DETECTION –

With this method you can more accurately leave messages on answering machines, although this is still not an exact science and may require some customizing of the AMD settings. The downsides to this method are that any delay in playing a message and some customers will hang up the phone and with answering machines you still have the possibility of missing some of the beginning of the recording on their machine. If using this method we usually recommend that you record your message twice in the recording file so that any portion of the message not heard at the beginning of a call will be played again.

Then let the Elision Support team know the method you selected, and the team will setup the configuration for you since setting up a campaign as such is complex and advance which we believe out of scope of this tutorial.

1. SET UP A “PRESS-1” TYPE, OR SURVEY, OUTBOUND DIALLING CAMPAIGN

For this tutorial we will be adding the ability to dial out and have the customer presented with a question to which they can respond by pressing a phone button(DTMF) key before the call is sent on to an agent or another destination.

1. Go to the Campaign Detail screen of the TESTCAMP campaign and click on the SURVEY sub-menu link in the third row from the top of the screen of links.
2. We will be filling in the fields with the following values:

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

<We leave Campaign Recording Directory blank we are not using CAMPREC\_60\_WAV> <We will leave Voicemail blank since we are not using VOICEMAIL method> <We will leave the third and fourth set of options blank as well>

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

1. Now that the campaign options are set, click on the Campaign Detail screen and change the VDAD exten to 8366. Also, make sure that your Campaign's Dial Method is set to RATIO and your dial level is set to “1”.
2. Now the campaign can be run as it normal, except that when a customer Answers, they will be played the first prompt, and will be expected to press a digit to indicate their response to the question. If they do not press a digit, and the No-Response action is set to 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 line will be hung up. The customer responses will be stored in the security\_phrase field.

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

1. If you want to ask more automated questions after the first question, then you can set the “Survey Method” to CALLMENU and point the “Survey Call Menu” option on this screen to the second question that you want to be answered by your survey takers. In that Call Menu, you will want to enable the “Log Key Press” option, and set the “Log Field” to the Elision Dialer \_list field that you want the response to the second question to be stored in.
2. SET UP BLENDED IN/OUTBOUND CALLING WITH YOUR INBOUND-ENABLED CAMPAIGN

For this tutorial we will be adding the ability to dial out from the inbound/closer-enabled campaign that we created in tutorial 7.

1. Go to the LISTS section of the Elision Dialer admin pages and load leads into a new list just like we did in step 6.2 of tutorial 6.
2. Make a new LIST for these new leads. We will use list ID 405108 for this tutorial.
3. Set list 405108 to active and go to the Campaign Modification page for the TEST\_IN Inbound-enabled campaign.
4. Set the local call time to 9am-9pm so that we do not place calls out after acceptable hours.
5. Make sure the dial level is set to 1 and the dial\_method is set to RATIO, or one of the ADAPT\_...dial methods, for the TEST\_IN campaign.
6. Go to the user modification page for users (agents) and change the "Closer Default Blended" field to "1" so that the check box for blended calling is selected by default when this agent logs in.
7. Login to the agent interface as user (agent) and select 4051000- TESTCAMP (or campaign you created) to take calls from, then click submit.
8. Click on the RESUME button and if there are no calls coming in you will start to dial outbound calls. If an inbound call comes in it will be queued and then sent to you after you finish the initial outbound call.
9. If you wish to stop dialing you can simply change the list of leads to inactive(set active to "N") or log out and back in and de-select the BLENDED check box at the bottom of the green inbound-group selection screen.

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

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

1. ADD A DID AND POINT IT TO GO TO A SPECIFIC LOGGED-IN ELISION DIALER AGENT

With Elision Dialer DIDs you have several choices in where to send calls. One of those options is to send a call to go to a user that is logged in as a Elision Dialer agent in the agent interface. The example below assumes that the phone number is 0712345678.

1. The first step is to create the DID entry that will send the incoming call to the agent. To get to the ADD A NEW DID ENTRY page you need to be in the IN-GROUPS section, then you can click on the ADD NEW DID link.
2. On the Create DID page you will put the following values in:

* DID Extension: 0712345678
* DID Description: Direct agent extension for user Elision c-user1
* Admin User Group : your company

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

* Active: Y
* DID Route: AGENT
* User Agent: Elision c-user1(agent user id)
* User Route Settings In-Group: AGENTDIRECT
* User Unavailable Action: VOICEMAIL
* Voicemail Box: 4051001 <you need to go to Admin → Voicemail to create this voicemail box> <we will leave the other fields in their default values>

In the above example, the call will go into the AGENTDIRECT in-group where it will wait until the drop timeout of that In-Group and if the agent is still not available the call will be directed to the Voicemail box 4051001. You can also send the call to another in-group or even an extension instead of sending it to voicemail. You can set up multiple AGENTDIRECT in-groups to be able to use different settings for different groups of AGENTDIRECT calls. They just need to have AGENTDIRECT at the beginning of the in-group name, such as AGENTDIRECT2, AGENTDIRECTA, etc...

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

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

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

● Menu ID: WELCOME\_MENU

● Menu Name: General welcome menu

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

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

● Menu Invalid Prompt: invalid

● Menu Repeat: 2

Option: 1 <select “1” from the pull-down menu> Description: Sales

Route: INGROUP

In-Group: 405sales <You will have to create this In-Group>

Handle Method: CID

List ID: 405998 <You will have to create this list>

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

Description: Tech Support

Route: INGROUP

In-Group: 405support <You will have to create this In-Group>

Handle Method: CID

List ID: 405998 <You will have to create this list>

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

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

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

1. The next step is to create the DID entry that will send calls to the main inbound number to this new Call Menu
2. Click on the “Add A New DID” link in the left sidebar. On the Create DID page you will put the following values in:

● DID Extension: 0712345678

● DID Description: Main Number Route to Call Menu

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

● Active: Y

● DID Route: CALLMENU

● Call Menu: WELCOME\_MENU

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

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

1. ADD A “IF YOU KNOW THE EXTENSION...” OPTION TO A CALL MENU USING WITH AGENTDIRECT

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

Please request from Elision support if you want the above feature configured.

1. ADD EXTERNAL PHONE ENTRY FOR YOUR MOBILE PHONE THEN LIVE MONITOR USING THE REAL-TIME REPORT

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

Request Elision support to setup your mobile as a monitoring device then follow the steps to listen to an agent call.

1. Go to the Real-time Report and click on the “Choose Report Display Options” link at the top of the page, select the campaigns you want to view activity for, set Monitor to “MONITOR” and put the following in the Phone field “Elision \_monitor” (Will be provided by Elision support when they create this feature). Then click submit.
2. Now you will see a LISTEN column show up with the agent listings within the report. To monitor one of the agents simply click on the LISTEN link next to the User of the agent you want to listen to. This will launch a phone call to your cell phone. When you are done, simply hang up the phone and click to listen to another agent.
3. CREATING CUSTOM FIELDS

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

1. Select “Lists”, and click on the list you wish to add custom field to. Scroll to the bottom of the list modification page and select the link “Custom fields defined for this list:0”. Once the additional fields have been created on this list, the 0 will be replaced with the total number of custom fields.
2. Custom fields can be used to create a wide range of field types (See the Custom Fields section of this manual for more information), but for this tutorial we will create a multiple choice pulldown menu. It's a common request and is more complex than creating a simple text field.

* New Field Rank: 1
* New Field Order: 1
* Field Label: favorite\_color - This is the unique database identifier for this custom field. After this has been submitted, this will be the only field that can not be edited.
* Field Name: What is your favorite color? - This is what will appear beside the field, in the agent interface, that prompts the agent to ask for this information.
* Field Name Position: LEFT - This is where the Field Name will appear, in relation to the custom field.)
* Field Description: Favorite Color - The description of the field that appears in the Admin interface.
* Field Help: Select from pulldown - These are the additional instructions the agent will see if they select the “help” link next this custom field.
* Field Type: MULTI - This determines the type of field this will be. I've selected MULTI to create a pulldown menu of possible options.
* Field Options:
  1. red, Red
  2. blue, Blue
  3. silver, Silver
* The Field Options are entirely dependent on Field Type. For the pulldown example, each line represents a possible entry. First, is how the response will appear in the database. Then, separated by a comma, is how the entry would appear on the pulldown in the agent's interface.
* Option Position: HORIZONTAL - How the options for this custom field are arranged.
* Field Size: 3 - This field will mean different things, depending on what Field Type was chosen. For MULTI, it represents the number of options that will be visible when the agent clicks the pulldown menu. In this case, I want them to see all 3 options.
* Field Max: *blank -* Another Field that will mean different things depending on what Field Type was selected. It's not used for MULTI, so leave it empty.
* Field Default: NULL - This option already placed in the field to start. If the agent does not update this field while on the phone with the customer, this will submitted as the response. This Field must have either contain data or be NULL, but it can not be left blank. You will receive an error attempting to load leads onto a list that has left this field blank.

1. Click “submit” at the bottom of the page to create the custom field.
2. The page will re-load showing an overview of the newly created field at the top in blue. Below, in white, is an example of how the custom field would appear on the agent interface. You also have the ability to go back and edit anything but Field Label on your previous entries.
3. Now the list ready. If you load leads onto it, using the web-based lead loader, The customer fields now appear on the load screen where you define the terms.

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

1. OVERVIEW OF ALL MANAGER SCREENS FUNCTIONS

In this section you will see in-depth descriptions of all of the screens in the realm of Elision Dialer Contact Centre management.

## ELISION DIALER USERS

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

## ADDING A NEW USER

You can get to the Add User screen by clicking on the "ADD A NEW USER" link at the top of the USERS section. As with most Elision Dialer add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted, to save space and duplication. When adding a new user, you must make sure that you set the User 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 Elision Dialer should contain a created “name” or “ID” that starts with “0”. Leading zeroes have been know to cause problems, so we recommend starting with positive integers. Once you create a user, you will not be able to change that user 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.

Elision recommends creating a user ID stating with your company name as prefix for example Elision john or Elision adam

## MODIFY USER

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 Elision Dialer user record.

## DESCRIPTIONS OF ELISION DIALER USER FIELDS

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

**User Number** - This field is where you put the Elision Dialer users ID number, can be up to 20 characters inlength, Must be at least 2 characters in length with no spaces or punctuation of any kind.

**Password** - This field is where you put the Elision Dialer users password. This must be at least 2 charactersin length up to 20 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. Itencourages use of upper & lower case letters and numbers, to ensure password complexity. The most secure passwords are long passwords.

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

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

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

**User Level** - This menu is where you select the Elision Dialer user's user level. Must be a level of 1 to loginto Elision Dialer , Must be level 2 or higher to take inbound calls, Must be a user level of 7 or higher to view reports. Must be user level 8 or greater to get into the admin web section. Inside of the administration screen if the user has a user level of 8, they will only be able to alter the options of users with a lower user level than theirs. Only users with the user\_level of 9 can view and modify their own settings. Be careful when assigning a manager a user level of 9.

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

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

**Phone Pass** - Here is where you can set a default phone password value for when the user logs intoElision Dialer agent interface. This value will populate the phone\_pass automatically when the user logs in with their user-pass-campaign in the Elision Dialer agent 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 Elision Dialer resources.Default is Active. If the user is set to not active then they will not be shown in the initial display of the users when you go to the user list.

**Voicemail ID -** This is the voicemail box that calls will be directed to in an AGENTDIRECT in-groupat 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 customapplications.

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

**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 theircampaign set to blended or not, and if not then the default blended setting will be used. Default is 1 for enabled.

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

**Scheduled Callbacks** - This agent interface option allows an agent to disposition a call as CALLBKand 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 arethe 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 Elision Dialer records, it will retrieve the customer's information as it places the call. If the phone number is not in the records, Elision Dialer will create a brand new lead for that

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

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

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

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

**Agent Alter Customer Data Override** - This option will override the current campaign settings foraltering 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 foraltering 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 setfor Shift Enforcement. DISABLED will use the user group setting. OFF will not enforce shifts at all. START will only enforce the login time but will not affect an agent that is running over their shift time if they are already logged in. ALL will enforce shift start time and will log an agent out after they run over the end of their shift time. Default is DISABLED.

**Agent Call Log View Override** -This setting will override whatever the users user group has set forAgent 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.

**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.

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

**Alert Enabled** - This field shows whether the agent has web browser alerts enabled for when callscome into their Elision Dialer agent session. Default is 0 for NO. For more information on Agent Alerts, please refer to the Elision Dialer Agent Manual. Only the Agent can activate and deactivate this feature when they are logged into their Elision Dialer 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 agentfor 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, itwill disable contact searching for only this user. Default is NOT\_ACTIVE, which uses the current campaign setting.

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

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

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

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

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

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

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

**QC User Level -** This defines the agent's Quality Control user level, and dictates the level offunctionality 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 reviewingthe record.

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

**QC Commit -** allows the agent to specify that a record has been committed in QC. At that point, it canno longer be modified by anyone.

**Realtime Block User Info -** This setting if set to 1 will block user and station information from beingdisplayed 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 thecustomer 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 thecustomer phone numbers in the many reports and screens in the system with Xs. The DIGITS settings will show only the last X digits of the phone number. Default is 0 for disabled.

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

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

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

**Alter Agent Interface Options** - This admin interface option, if set to 1, allows the manager-level userto 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 usersettings on the campaign that an agent is logged into while they are logged into it. For instance, the real-time report has a feature allowing a manager to change the selected Inbound Groups of an agent, this field must be enabled for the manager to be able to make those changes. Default is 0-not active.

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

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

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

**Load Leads** - This admin interface option, if set to 1, allows the user to load Elision Dialer leads into theElision Dialer \_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 adminsection 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 containingall 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 theREPORTS 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 fromthe DNC lists in the Elision Dialer system.

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

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

**Campaign Detail -** This admin interface option, if set to 1, allows the user to view and modify thecampaign 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 Elision Dialer campaigns from the system. Default is 0-not active.

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

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

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

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

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

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

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

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

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

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

**AGC Delete Phones** - This admin interface option, if set to 1, allows the user to delete phone entries inthe 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 andstate 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 Elision Dialer call timesrecords and Elision Dialer 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 Adminsection. This includes trunk reservations. Default is 0.

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

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

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

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

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

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

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

**Modify Audio Store -** This option allows the user to view and make changes to the Audio Storesettings 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 Holdsettings 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" settingsin the Admin section. Default is 0 - not active.

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

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

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

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

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

**Manager Shift Enforcement Override** - This setting if set to 1 will allow a manager to enter theiruser 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.

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

**API List Restrict -**This option will restrict any API actions used by this user to be restricted onlywithin the lists included within the user group allowable campaigns for this user. Default is 0 for disabled.

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

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

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

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

## 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 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.

1. ELISION DIALER CAMPAIGNS

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

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

## ADD A NEW CAMPAIGN

You can get to the Add Campaign screen by clicking on the "ADD CAMPAIGN" link at the top of the CAMPAIGNS section. As with most Elision Dialer add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new campaign you must make sure that you set the campaign ID and campaign name or the submission will not be accepted. Also, please make sure that the campaign ID you have chosen is only letters or numbers; it should not have any spaces or punctuation (that includes not using dashes “-”), and you cannot use the same ID for a campaign and an in-group. Once you create a campaign, you will not be able to change that campaign ID unless you delete the campaign and re-create it again with a different campaign ID. You cannot have duplicate campaign IDs in the system, and campaign IDs must be between 2 and 8 characters in length.

## COPY A CAMPAIGN

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

## MODIFY CAMPAIGNS

f 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 inlength.

**Campaign Description** - This is a memo field for the campaign, it is optional and can be a maximumof 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 thiscampaign.

**8 Day outbound call count graph** - measuring the total calls for the day for campaigns as well as themaximum 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 tolog into it.

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

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

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

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](about:blank)” 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 thisfield 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 tosend the call to a local or internal Elision Dialer closer. Setting to Y will make the Allowed Closers section appear at the bottom of the Campaign options screen, upon submit. If set to N, then there will be no options to transfer a call to another agent on the Elision Dialer system. Allow

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

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

**Allow Inbound and Blended** - Set whether the users of this campaign will have the option to takecalls from inbound sources (like Elision Dialer 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 areactive 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 willbe put in the lead hopper:

* DOWN: select the first leads loaded into the Elision Dialer \_list table
* UP: select the last leads loaded into the Elision Dialer \_list table
* UP PHONE: select the highest phone number and works its way down
* DOWN PHONE: select the lowest phone number and works its way up
* UP LAST NAME: starts with last names starting with Z and works its way down
* DOWN LAST NAME: starts with last names starting with A and works its way up
* UP COUNT: starts with most called leads and works its way down
* DOWN COUNT: starts with least called leads and works its way up
* DOWN COUNT 2nd NEW: starts with least called leads and works its way up inserting a NEW lead in every other lead. Must NOT have NEW selected in the dial statuses
* DOWN COUNT 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 beenplaced 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, theList 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 forthe selected List Mix entry in the List Mix sub section instead. Default is DISABLED. By Default, List Mix is disabled and will not function until your administrator activates List Mix functionality on the server. For the vast majority of Elision Dialer users, we DO NOT recommend using List Mix.

**Lead Filter** - This is a method of filtering your leads using a fragment of a SQL query. Use this featurewith 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 frombeing dialed, to disable set to 0. This setting is very useful in countries like the UK where there are regulations preventing the attempted calling of customers within 72 hours of an Abandon, or DROP. Default is 0.

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

**Call Count Limit -** This enforces a limit on the number of call attempts for the leads dialed in thiscampaign. 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 modificationpage and some reports, 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 thiscampaign. 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 Elision Dialer to automatically adjust the hopperbased 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 theMinimum Hopper Level. Default is Y.

**Hopper VLC Dup Check -** Setting this to Y will result in every lead being inserted into the hopperbeing 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.

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

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

**Auto Dial Level Threshold** - This setting is specific to the ADAPT or RATIO Dial Methods, and mustbe 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 whencalculating 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 youwould like while using an adaptive-predictive dial method, not MANUAL, INBOUND\_MAN or RATIO. The maximum allowable dropped-to-human-answered calls ratio percentage according to the United States FTC regulations is 3%.

**Maximum Adapt Dial Level** - This field is where you set the limit to the number of lines you wouldlike 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 shouldenter 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 aspecific 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 leveldifference 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 atthe 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 outboundcampaign 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 aCampaign 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 leadwhile 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 Elision Dialer \_live\_agents table
* oldest\_call\_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
* oldest\_call\_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
* overall\_user\_level: orders by the user\_level of the agent as defined in the Elision Dialer \_users table a higher user\_level will receive more calls.
* campaign\_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
* campaign\_grade\_random: orders based on the agent's User Grade for the campaign. The higher the agent's User Grade, the higher their probability to receive a call.
* fewest\_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
* longest\_wait\_time: orders by the amount of time agent has been actively waiting for a call

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

**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 differentmethod 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 placingmanual 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 withinElision Dialer . For instance if you are dialing in the UK from the UK you would have 44 in as your phone\_code field for all leads, but you just want to dial 10 digits in your dialplan extensions.conf to place calls instead of 44 then 10 digits. Default is N.

**Campaign Caller ID** - This field allows for the sending of a custom caller ID number on the outboundcalls. This is the number that would show up on the caller ID of the person you are calling. The caller IDs you would enter here either full national number or virtual mobile numbers should be provided and activated by Elision team. If you wish to hide caller ID please contact Elision team as it should be activated on the Elision Softswitch.

**Custom Caller ID -** When set to Y, this option allows you to use the security\_phrase field in theElision Dialer \_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 usedifferent 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 withElision Dialer . This allows you to use different extensions depending upon how long you want to allow a maximum recording and what type of codec (audio compression) you want to record in. The default extension is 8309. 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 thiscampaign. 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 whenCampaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN INGROUP CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID CALLID RECID. If your dialers have --POST recording processing enabled, you can also use POSTVLC POSTSP POSTARRD3 POSTSTATUS. These POST options will alter the recording file name after the call has been finished and will replace the post variable with the value from the default fields. Before you use any POST variables, please confirm that this optional feature is enabled on the dialers. The default is FULLDATE\_AGENT and would look like this 20051020-103108\_6666. Another example is CAMPAIGN\_TINYDATE\_CUSTPHONE which would look like this: TESTCAMP\_51020103108\_3125551212.

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

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

**Routing Initiated Recording** -This option, if enabled, allows you to have the call routing script forOutbound auto-dial calls trigger the agent call recording instead of the agent screen. This option will only work if the recording option is set to ALLCALLS or ALLFORCE. This will not work with agent manual dialed calls. Default is N for disabled.

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

**Comments All Tabs** -Setting this option to ENABLED will display the Comments field on all tabs inthe main agent screen. Default is DISABLED.

**Comments Dispo Screen** -Setting this option to ENABLED will display the Comments field at the topof the agent disposition screen. If the REPLACE\_CALL\_NOTES option is selected, then the Comments field will replace the Call Notes field on the disposition screen if Per Call Notes is enabled. Default is DISABLED.

**Comments Callback Screen** -Setting this option to ENABLED will display the Comments field at thetop of the callback scheduling screen. If the REPLACE\_CB\_NOTES option is selected, then the Comments field will replace the Callback Notes field on the callback scheduling screen. Default is DISABLED.

**QC Comments History** -Setting this option to AUTO\_OPEN will automatically open the QCcomments history panel in the agent interface when a call goes to the agent screen that has QC comments. The MINIMIZE options will allow the QC Comment History panel to collapse to the bottom of the screen when you click to hide it instead of it disappearing completely. Default is CLICK.

**Hide Call Log Info** -Enabling this option will hide any call log or call count information when leadinformation is displayed on the agent screen. Default is N.

**Agent Lead Search -** Setting this option to ENABLED will allow agents to search for leads and viewlead 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 agentwill 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' screensfor this campaign. Select NONE to show no script for this campaign. To see more information on the Script that has been selected just click on the linked "Script".

**Clear Script** -This option if enabled will clear the agent SCRIPT tab after a call has been dispositionedby the agent. Default is DISABLED.

**Get Call Launch** - This menu allows you to choose whether you want to auto-launch WEBFORM orWEBFORM2 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 the prompt to play when the agent gets ananswering machine and clicks on the Answering Machine Message button in the transfer conference frame. You must set this to either an audio file in the audio store or a TTS prompt if TTS is enabled on your system. You can also use lead fields to generate audio filenames using the DYN flag, for instance using DYN--A--user--B-- for agent 1234 would look for a file named 1234.wav in your audio store to play.

**Wait For Silence Options –** This is used to determine when the customer's outgoing answeringmachine message has completed, so that Elision Dialer 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

**AM Message Wildcards** -This option, if enabled, allows you to go to the AM Message Wildcardadministration page(the link appears after you set this field to ‘Y’ and submit) where you can define wildcards that can match data in a default lead field and can play a different message based upon the data in a specific lead. Default is N for disabled.

**AMD send to Action** - This option allows you to define whether a call is sent to the AMD Actionwhen 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 youwill 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.

**CPD Unknown Action** -If you are using the Sangoma ParaXip Call Progress Detection software andyou want to send calls that have an Unknown result to a destination other than an agent, then you will want to enable this setting either setting it to DISPO which will disposition the call as AA and hang it up if the call is being processed and has not been sent to an agent yet or MESSAGE which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED. Setting this to INGROUP will send an answering machine to an inbound group. Setting this to CALLMENU will send an answering machine to a Call Menu in the system.

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

**AMD Call Menu –** When CPD AMD Action has CALLMENU selected, this specifies which CallMenu 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 Elision Dialer 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 ofthe 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 theTransfer-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 screenbelow 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 TransferConference 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 AGIapplication 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 D1through 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 TimerAction is triggered.

**Timer Action Seconds -** This is the amount of time after the call is connected to the customer that theTimer 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 thatyou want the call sent to if the Time Action is set to CALLMENU, EXTENSION or IN\_GROUP. Default is empty.

**Scheduled Callbacks** - This option allows an agent to disposition a call as CALLBK and choose thedata and time at which the lead will be re-activated. For this option to work, the agents in the campaign must also have their Elision Dialer user option for scheduled callbacks enabled. If you want the agents in this campaign to have USERONLY callbacks, where they can reserve a callback for only themselves, their Elision Dialer user options for Agent only callbacks should be enabled.

**Scheduled Callbacks Alert -** This option allows the callbacks status line in the agent interface to bered, 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 agentcallback 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 callbackscalendar 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 scheduledcallback 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 inthe agent callback list from being dialed if it is outside of the scheduled calltime for the campaign. Default is DISABLED.

**Scheduled Callbacks Active Limit** -This option if enabled will limit an agent to this number of activeor live user-only callbacks. If the limit is reached, the agent will not be able to select the My Callback checkbox when setting a callback for a lead. Default is 0 for disabled.

**Scheduled Callbacks Active Limit Override**- Enabling this option will allow the Custom User 3 fieldto override the Scheduled Callbacks Active Limit. Default is N for disabled.

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

**Show Previous Callback** -This option if enabled will show on the agent screen with a separate yellowpanel information about the previously set callback that the agent has up on their screen. Disabling this option will not show that panel. Default is ENABLED.

**Scheduled Callbacks Useronly Move Minutes** -This option if set to a number greater than 0, willchange all USERONLY Scheduled Callbacks that are X minutes after their callback time to ANYONE callbacks. This process runs every minute. Default is 0 for disabled.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the callis 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 waitingfor 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 aton 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 toCALLMENU.

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

**Drop Transfer Group** - If Drop Action is set to IN\_GROUP, the call will be sent to this inboundgroup 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 fieldmust 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 ordial 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 ifwrapup seconds is set.

**Wrap Up Bypass** -If set to ENABLED then the agent will be able to click a link to stop the Wrap Uptimer before the time is completed. Default is ENABLED.

**Wrap Up After Hotkey** -If set to ENABLED and the campaign has hotkeys configured and the agentterminates a call with a hotkey, then the wrap up settings will be used after that call. Default is DISABLED.

**Dead Call Max Seconds** -If this is set to greater than 0, after a customer hangs up and the agent hasnot clicked on the Hangup Customer button in this number of seconds, the call will automatically be hung up, the status below will be set and the agent will be paused. Default is 0 for disabled.

**Dead Call Max Status** -If Dead Call Max Seconds is enabled, this is the status set for the call when theagent dead call is not hung up past the number of seconds set above. Default is DCMX.

**Dispo Call Max Seconds** -If this is set to greater than 0, and the agent has not selected a dispositionstatus in this number of seconds, the call will automatically be set to the status below and the agent will be paused. Default is 0 for disabled.

**Dispo Call Max Status** -If Dispo Call Max Seconds is enabled, this is the status set for the call whenthe agent has not selected a status past the number of seconds set above. Default is DISMX.

**Agent Pause Max Seconds** -If this is set to greater than 0, and the agent has not gone out of PAUSEDstatus in this number of seconds, the agent will automatically be logged out of the agent screen. Default is 0 for disabled.

**Customer Gone Warning Seconds** -This setting controls the number of seconds after a customerhangs up before a warning that the customer has hung up will appear on the agent screen. Default is 30.

**Use Internal DNC List** - This defines whether this campaign is to filter leads against the Internal DNClist, 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 listthat 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 adifferent 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 PAUSEbutton in Elision Dialer agent interface. Pause codes are definable per campaign at the bottom of the campaign view detail screen and they are stored in the Elision Dialer \_agent\_log table. FORCE will force the agents to choose a PAUSE code if they click on the PAUSE button. Default is N.

**Auto Pause Pre-Call Work** - In auto-dial mode, when enabled this setting, will set the agent to pausedautomatically 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 activeautomatically 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 AgentPause 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 Elision Dialer stats refresh, even if thecampaign is not active. The Elision Dialer stats are shown on the campaign real-time report(AST\_timeonVDADall.php).

**Real- Time Agent Time Stats -** Setting this to anything but DISABLED will enable the gathering ofagent 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 anagent 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 displayedon 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 areno 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 onlyavailable 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 theownership 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 willpopulate 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, theagent 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 leadsavailable in the campaign in the agent screen. This number is updated in the system once a minute and will be refreshed on the agent screen every few seconds.

**Agent Screen Labels -** You can select a set of agent screen labels to use with this option. Default is

--SYSTEM- SETTINGS-- for the default labels. Additional labels can be created in the Admin section, by selecting the “Screen Labels” link.

**Allow Required Fields** -Must be enabled for required fields as defined in screen labels to work. Oncea field is designated as required, the agent will not be allowed to hang up a lead until there is something filled in within that field, this will affect all calls the agent receives or places. Default is N for disabled.

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

**Status Display In-Group** -This option if set to ENABLED will display the In-Group name in theagent screen when an inbound call is sent to the agent. Default is ENABLED.

**Agent Display Fields** -This option allows you to display hidden fields as read-only in the agent screen.Available fields are entry\_date, source\_id, date\_of\_birth, rank, owner, last\_local\_call\_time. Default is blank.

**Agent Display Queue Count -** If set to Y, when a customer is waiting for an agent, the Queue Callsdisplay 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 showup 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 theywant 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 theagent 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 callautomatically. Default is N.

**Agent Pause After Next Call Link** – When enabled, this displays a link on the agent screen that willallow 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 agentswhen they are logged into this campaign. NONE will follow the Users setting, ALLOW\_ALL will allow any agent logged into this campaign to place manual dial calls, DISABLE\_ALL will not allow anyone logged into this campaign to place manual dial calls. Default is NONE.

**Manual Dial Override Field** -The setting if set to ENABLED will show the Manual Dial Overridefield in the agent screen. Default is ENABLED.

**Manual Dial List ID -** The default list\_id to be used when an agent places a manual call and a newlead record is created in Elision Dialer \_list. Default is 999. This field can contain digits only.

**Manual Dial Filter** - This allows you to filter the calls that agents make in manual dial mode for thiscampaign by any combination of the following: DNC - to kick out, CAMPAIGNLISTS - the number must be within the lists for the campaign, NONE - no filter on manual dial or fast dial lists.

CAMPLISTS\_ALL - will include inactive lists in the search for the number. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number.

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

**Manual Dial Search Checkbox** -This allows you to define if you want the manual dial searchcheckbox to be selected by default or not. If an option with RESET is chosen, then the checkbox will be reset after every call. If an option with LOCK is chosen, then the agent will not be able to click on the checkbox. Default is SELECTED.

**Manual Dial Search Filter** -This allows the agent to search only within lists belonging to this campaign when the agent has the Manual Dial Search Checkbox selected in the manual dial screen. The options are, CAMPLISTS\_ONLY - will check for the number within the active lists for the campaign, CAMPLISTS\_ALL - will also include inactive lists in the search for the number, NONE - no filter on manual dial searching. Default is NONE. If a lead is not found, then a new lead will be added. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number.

**Manual Dial by Lead ID** -This allows the agent in manual dial mode to place a call by lead\_id insteadof a phone number. Default is N for disabled.

**Manual Call Time Check -** If this option is enabled, it will check all manual dial calls to make surethey 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 campaigncaller 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.

**Manual Dial Timeout** -This is an override field that, if populated, will override the campaign dialtimeout setting for manual dialed calls. Default is blank for disabled.

**Phone Post Time Difference Alert -** This manual-dial-only feature, if enabled, will display an alert ifthe 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 arelogged 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 featureis not DISABLED. This option restricts the selectable In-Groups that the agent can place In-Group Manual Dial calls through. CAMPAIGN\_SELECTED will show only the in-groups that the campaign has set as allowable in-groups. ALL\_USER\_GROUP will show all of the in-groups that are viewable to the members of the user group that the agent belongs to.

**Manual Auto Next Seconds** -If the Dial Method is set to MANUAL or INBOUND\_MAN, then thissetting will trigger the next lead to be automatically be dialed after this number of seconds. If enabled, it cannot be set lower than 5 seconds. Default is 0 for disabled.

**Manual Auto Next Show Timer** -If the Manual Auto Next Seconds option above is enabled, thissetting will display a countdown timer to the agent if enabled. Default is N for disabled.

**Manual Alt Num Dialing** -This option allows an agent to manually dial the alternate phone number oraddress3 field after the main number has been called. If the option has SELECTED in it then the Alt Dial checkbox will be automatically checked for each call. If the option has TIMER in it then the Alt Phone or Address3 field will be automatically be dialed after Timer Alt Seconds. Default is N for disabled.

**Timer Alt Seconds** -If the Manual Alt Num Dialing setting has TIMER in it then the Alt Phone orAddress3 field will be automatically be dialed after this number of seconds. Default is 0 for disabled.

**Agent Screen Clipboard Copy** - THIS FEATURE IS CURRENTLY ONLY ENABLED FORINTERNET EXPLORER. This feature allows you to select a field that will be copied to the computer clipboard of the agent computer upon a call being sent to an agent. Common uses for this are to allow for easy pasting of account numbers or phone numbers into legacy client applications on the agent computer.

**3-Way Call Outbound Caller ID** - This defines what is sent out as the outbound caller ID numberfrom 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 acustomer 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 todefine 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 tohave 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 thisto 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 selectedfirst by default when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

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

**CRM Popup Address -** The web address of a CRM login page, it can have variables populated justlike 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 issent 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://dialer1.cc.Elision .com.au/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\_diale d=Y\_1&log\_to\_file\_1=1

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

If you set the Dispo Call URL field to “ALT” and submit, then a new link to the Alternate Dispo Call URL amin page will appear. This page will allow you to set multiple Dispo Call URLs that can all be executed after a call is dispositioned by an agent. This page also has more options on when to execute these Alternate Dispo Call URLs by a list of statuses and/or lists.

**No Agent Call URL -** This web URL address is not seen by the agent, but if it is populated it is calledevery 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 thephone 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 ifthey 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 beingmonitored 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 ofsomeone 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 inboundgroups 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 whenthe 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 thiscampaign can transfer calls to. Allow Closers must be enabled for this option to show up.

### LISTS WITHIN THIS CAMPAIGN

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

### DIALABLE LEADS AND LEADS IN THE HOPPER

There is a tally of the dialable leads in this campaign as well as a count of the total number of leads in the hopper. Also, below those lines is a link to see what leads are in the hopper. That report shows you more detail information on the leads in the hopper including the called count, status, phone number state and other information.

### CAMPAIGN RANKS AND CALL COUNTS

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

### TEST OUTBOUND CALL

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

### CAMPAIGN-SPECIFIC CUSTOM STATUSES

Through the use of custom campaign statuses, you can have statuses that only exist for a specific campaign. The Status must be 1-6 characters in length, the description must be 2-30 characters in length and the "Agent Selectable" field defines whether it shows up in the agent interface as a disposition. In this section of the Campaign Modification Detail screen you can add new Custom Statuses one at a time or remove existing ones by clicking on the DELETE link next to the status listing. For the Campaign's DNC and campaign-DNC list settings to work properly you must remember to properly set the Campaign and System Statuses to DNC=Y if you want the status to be a DNC-list-insert status. The human\_answered field is used when calculating the drop percentage, or abandon rate. Setting human\_answered to Y will use this status when counting the human-answered calls. The Category option allows you to group several statuses into a category that can be used for statistical analysis. There are also 7 additional settings that will define the kind of status: sale, dnc, customer contact, not interested, unworkable, scheduled callback, completed. The MIN SEC and MAX SEC fields for each status will determine whether an agent can select that status at the end of their call based upon the length of the call. If the call is 10 seconds and the MIN SEC for a status is set to 20 seconds, then the agent will not be able to select that status. Also, if a call is 40 seconds and the MAX SEC for a status is set to 30 seconds, then the agent will not be able to select that status.

### CAMPAIGN HOTKEYS

Through the use of custom campaign hotkeys, agents that use the Elision Dialer web-client can hangup and disposition calls just by pressing a single numeric key on their keyboard. You need to choose a number 1 through 9 and then select a status for that hotkey. Hotkeys are reloaded by the Elision Dialer client when the agent logs into a campaign.

There are two special HotKey options that you can use in conjunction with Alternate Phone number dialing 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. If MULTI\_LEAD is selected, then a new link will appear higher up on the Campaign Modification page that goes to a Multi-Lead Settings page where you can configure how you want the Multi-Lead auto-alt dialling to run.

### 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 dialling. You may run out of a specific groups of leads and you would be dialling leads that are not in the percentage mix that you wanted. The dialler 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 11 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 upthe phone when running a survey campaign

**Survey DTMF Digits** - This field is where you define the digits that a customer can press as an optionon a survey campaign. valid DTMF digits are 0123456789\*#

**Survey Not Interested Digit** - This field is where you define the customer digit pressed that will showthey 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 Elision Dialer internal DNC list and possibly the campaign-specific DNC list.

**Survey Wait Seconds** - the number of seconds (when in Survey mode) the system will wait, after themessage, 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-into 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 hasopted-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 surveyquestion, 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 eachDTMF digit option that the customer may select.

**Survey Xfer Extension** - If the Survey Method of EXTENSION is selected then the customer callwould be directed to this dialplan extension.

**Survey Campaign Recording Directory** - If the Survey Method of CAMPREC\_60\_WAV is selectedthen 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 ispressed by the customer.

**Survey Fourth Digit -** This allows for a fourth call path if the Fourth digit as defined in this field ispressed by the customer.

**Survey Third Audio File -** This is the third audio file to be played upon the selection by the customerof the Third Digit option.

**Survey Third Status -** This is the third status used for the call upon the selection by the customer ofthe Third Digit option.

**Survey Third Extension -** This is the third extension used for the call upon the selection by thecustomer 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 issent to if they opt-in.

**Survey Recording -** If enabled, this will start recording when the call is answered. Only recommendedif 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 statusparameters 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 specialpunctuation.

**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, percentagesand 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\_MIXwill 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 Elision Dialer 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 “Presets” link at the top to create the preset list of transfer and/or conference phone numbers. The menu allows for a Preset Name, the home number, and any additional DTMF code to follow. The number can also remain hidden from the agent. A “Presets” link appears at the bottom right corner of the agent's screen within the Transfer Conference frame(in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it shows all their available preset phone numbers. Selecting the entry from the list places it in the “Number to Call” field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact\_information is enabled on your system, and is a custom feature.

### AC-CID (AREA CODE CALLER IDS)

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

### QC

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

**QC Statuses** - contains a complete list of statuses available in the campaign. Marking the checkboxindicates 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 theWEBFORM 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 areignored for these functions.

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

**QC Show Recording** - Allows for a recording that may be linked with the QC record to be displayedin 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.

1. ELISION DIALER CAMPAIGNS

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

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

## ADD A NEW CAMPAIGN

You can get to the Add Campaign screen by clicking on the "ADD CAMPAIGN" link at the top of the CAMPAIGNS section. As with most Elision Dialer add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new campaign you must make sure that you set the campaign ID and campaign name or the submission will not be accepted. Also, please make sure that the campaign ID you have chosen is only letters or numbers; it should not have any spaces or punctuation (that includes not using dashes “-”), and you cannot use the same ID for a campaign and an in-group. Once you create a campaign, you will not be able to change that campaign ID unless you delete the campaign and re-create it again with a different campaign ID. You cannot have duplicate campaign IDs in the system, and campaign IDs must be between 2 and 8 characters in length.

## COPY A CAMPAIGN

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

## MODIFY CAMPAIGNS

f 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 inlength.

**Campaign Description** - This is a memo field for the campaign, it is optional and can be a maximumof 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 thiscampaign.

**8 Day outbound call count graph** - measuring the total calls for the day for campaigns as well as themaximum 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 tolog into it.

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

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

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

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](about:blank)” 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 thisfield 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 tosend the call to a local or internal Elision Dialer closer. Setting to Y will make the Allowed Closers section appear at the bottom of the Campaign options screen, upon submit. If set to N, then there will be no options to transfer a call to another agent on the Elision Dialer system. Allow

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

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

**Allow Inbound and Blended** - Set whether the users of this campaign will have the option to takecalls from inbound sources (like Elision Dialer 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 areactive 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 willbe put in the lead hopper:

* DOWN: select the first leads loaded into the Elision Dialer \_list table
* UP: select the last leads loaded into the Elision Dialer \_list table
* UP PHONE: select the highest phone number and works its way down
* DOWN PHONE: select the lowest phone number and works its way up
* UP LAST NAME: starts with last names starting with Z and works its way down
* DOWN LAST NAME: starts with last names starting with A and works its way up
* UP COUNT: starts with most called leads and works its way down
* DOWN COUNT: starts with least called leads and works its way up
* DOWN COUNT 2nd NEW: starts with least called leads and works its way up inserting a NEW lead in every other lead. Must NOT have NEW selected in the dial statuses
* DOWN COUNT 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 beenplaced 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, theList 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 forthe selected List Mix entry in the List Mix sub section instead. Default is DISABLED. By Default, List Mix is disabled and will not function until your administrator activates List Mix functionality on the server. For the vast majority of Elision Dialer users, we DO NOT recommend using List Mix.

**Lead Filter** - This is a method of filtering your leads using a fragment of a SQL query. Use this featurewith 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 frombeing dialed, to disable set to 0. This setting is very useful in countries like the UK where there are regulations preventing the attempted calling of customers within 72 hours of an Abandon, or DROP. Default is 0.

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

**Call Count Limit -** This enforces a limit on the number of call attempts for the leads dialed in thiscampaign. 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 modificationpage and some reports, 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 thiscampaign. 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 Elision Dialer to automatically adjust the hopperbased 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 theMinimum Hopper Level. Default is Y.

**Hopper VLC Dup Check -** Setting this to Y will result in every lead being inserted into the hopperbeing 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.

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

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

**Auto Dial Level Threshold** - This setting is specific to the ADAPT or RATIO Dial Methods, and mustbe 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 whencalculating 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 youwould like while using an adaptive-predictive dial method, not MANUAL, INBOUND\_MAN or RATIO. The maximum allowable dropped-to-human-answered calls ratio percentage according to the United States FTC regulations is 3%.

**Maximum Adapt Dial Level** - This field is where you set the limit to the number of lines you wouldlike 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 shouldenter 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 aspecific 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 leveldifference 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 atthe 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 outboundcampaign 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 aCampaign 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 leadwhile 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 Elision Dialer \_live\_agents table
* oldest\_call\_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
* oldest\_call\_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
* overall\_user\_level: orders by the user\_level of the agent as defined in the Elision Dialer \_users table a higher user\_level will receive more calls.
* campaign\_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
* campaign\_grade\_random: orders based on the agent's User Grade for the campaign. The higher the agent's User Grade, the higher their probability to receive a call.
* fewest\_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
* longest\_wait\_time: orders by the amount of time agent has been actively waiting for a call

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

**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 differentmethod 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 placingmanual 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 withinElision Dialer . For instance if you are dialing in the UK from the UK you would have 44 in as your phone\_code field for all leads, but you just want to dial 10 digits in your dialplan extensions.conf to place calls instead of 44 then 10 digits. Default is N.

**Campaign Caller ID** - This field allows for the sending of a custom caller ID number on the outboundcalls. This is the number that would show up on the caller ID of the person you are calling. The caller IDs you would enter here either full national number or virtual mobile numbers should be provided and activated by Elision team. If you wish to hide caller ID please contact Elision team as it should be activated on the Elision Softswitch.

**Custom Caller ID -** When set to Y, this option allows you to use the security\_phrase field in theElision Dialer \_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 usedifferent 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 withElision Dialer . This allows you to use different extensions depending upon how long you want to allow a maximum recording and what type of codec (audio compression) you want to record in. The default extension is 8309. 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 thiscampaign. 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 whenCampaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN INGROUP CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID CALLID RECID. If your dialers have --POST recording processing enabled, you can also use POSTVLC POSTSP POSTARRD3 POSTSTATUS. These POST options will alter the recording file name after the call has been finished and will replace the post variable with the value from the default fields. Before you use any POST variables, please confirm that this optional feature is enabled on the dialers. The default is FULLDATE\_AGENT and would look like this 20051020-103108\_6666. Another example is CAMPAIGN\_TINYDATE\_CUSTPHONE which would look like this: TESTCAMP\_51020103108\_3125551212.

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

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

**Routing Initiated Recording** -This option, if enabled, allows you to have the call routing script forOutbound auto-dial calls trigger the agent call recording instead of the agent screen. This option will only work if the recording option is set to ALLCALLS or ALLFORCE. This will not work with agent manual dialed calls. Default is N for disabled.

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

**Comments All Tabs** -Setting this option to ENABLED will display the Comments field on all tabs inthe main agent screen. Default is DISABLED.

**Comments Dispo Screen** -Setting this option to ENABLED will display the Comments field at the topof the agent disposition screen. If the REPLACE\_CALL\_NOTES option is selected, then the Comments field will replace the Call Notes field on the disposition screen if Per Call Notes is enabled. Default is DISABLED.

**Comments Callback Screen** -Setting this option to ENABLED will display the Comments field at thetop of the callback scheduling screen. If the REPLACE\_CB\_NOTES option is selected, then the Comments field will replace the Callback Notes field on the callback scheduling screen. Default is DISABLED.

**QC Comments History** -Setting this option to AUTO\_OPEN will automatically open the QCcomments history panel in the agent interface when a call goes to the agent screen that has QC comments. The MINIMIZE options will allow the QC Comment History panel to collapse to the bottom of the screen when you click to hide it instead of it disappearing completely. Default is CLICK.

**Hide Call Log Info** -Enabling this option will hide any call log or call count information when leadinformation is displayed on the agent screen. Default is N.

**Agent Lead Search -** Setting this option to ENABLED will allow agents to search for leads and viewlead 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 agentwill 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' screensfor this campaign. Select NONE to show no script for this campaign. To see more information on the Script that has been selected just click on the linked "Script".

**Clear Script** -This option if enabled will clear the agent SCRIPT tab after a call has been dispositionedby the agent. Default is DISABLED.

**Get Call Launch** - This menu allows you to choose whether you want to auto-launch WEBFORM orWEBFORM2 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 the prompt to play when the agent gets ananswering machine and clicks on the Answering Machine Message button in the transfer conference frame. You must set this to either an audio file in the audio store or a TTS prompt if TTS is enabled on your system. You can also use lead fields to generate audio filenames using the DYN flag, for instance using DYN--A--user--B-- for agent 1234 would look for a file named 1234.wav in your audio store to play.

**Wait For Silence Options –** This is used to determine when the customer's outgoing answeringmachine message has completed, so that Elision Dialer 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

**AM Message Wildcards** -This option, if enabled, allows you to go to the AM Message Wildcardadministration page(the link appears after you set this field to ‘Y’ and submit) where you can define wildcards that can match data in a default lead field and can play a different message based upon the data in a specific lead. Default is N for disabled.

**AMD send to Action** - This option allows you to define whether a call is sent to the AMD Actionwhen 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 youwill 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.

**CPD Unknown Action** -If you are using the Sangoma ParaXip Call Progress Detection software andyou want to send calls that have an Unknown result to a destination other than an agent, then you will want to enable this setting either setting it to DISPO which will disposition the call as AA and hang it up if the call is being processed and has not been sent to an agent yet or MESSAGE which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED. Setting this to INGROUP will send an answering machine to an inbound group. Setting this to CALLMENU will send an answering machine to a Call Menu in the system.

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

**AMD Call Menu –** When CPD AMD Action has CALLMENU selected, this specifies which CallMenu 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 Elision Dialer 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 ofthe 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 theTransfer-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 screenbelow 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 TransferConference 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 AGIapplication 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 D1through 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 TimerAction is triggered.

**Timer Action Seconds -** This is the amount of time after the call is connected to the customer that theTimer 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 thatyou want the call sent to if the Time Action is set to CALLMENU, EXTENSION or IN\_GROUP. Default is empty.

**Scheduled Callbacks** - This option allows an agent to disposition a call as CALLBK and choose thedata and time at which the lead will be re-activated. For this option to work, the agents in the campaign must also have their Elision Dialer user option for scheduled callbacks enabled. If you want the agents in this campaign to have USERONLY callbacks, where they can reserve a callback for only themselves, their Elision Dialer user options for Agent only callbacks should be enabled.

**Scheduled Callbacks Alert -** This option allows the callbacks status line in the agent interface to bered, 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 agentcallback 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 callbackscalendar 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 scheduledcallback 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 inthe agent callback list from being dialed if it is outside of the scheduled calltime for the campaign. Default is DISABLED.

**Scheduled Callbacks Active Limit** -This option if enabled will limit an agent to this number of activeor live user-only callbacks. If the limit is reached, the agent will not be able to select the My Callback checkbox when setting a callback for a lead. Default is 0 for disabled.

**Scheduled Callbacks Active Limit Override**- Enabling this option will allow the Custom User 3 fieldto override the Scheduled Callbacks Active Limit. Default is N for disabled.

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

**Show Previous Callback** -This option if enabled will show on the agent screen with a separate yellowpanel information about the previously set callback that the agent has up on their screen. Disabling this option will not show that panel. Default is ENABLED.

**Scheduled Callbacks Useronly Move Minutes** -This option if set to a number greater than 0, willchange all USERONLY Scheduled Callbacks that are X minutes after their callback time to ANYONE callbacks. This process runs every minute. Default is 0 for disabled.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the callis 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 waitingfor 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 aton 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 toCALLMENU.

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

**Drop Transfer Group** - If Drop Action is set to IN\_GROUP, the call will be sent to this inboundgroup 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 fieldmust 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 ordial 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 ifwrapup seconds is set.

**Wrap Up Bypass** -If set to ENABLED then the agent will be able to click a link to stop the Wrap Uptimer before the time is completed. Default is ENABLED.

**Wrap Up After Hotkey** -If set to ENABLED and the campaign has hotkeys configured and the agentterminates a call with a hotkey, then the wrap up settings will be used after that call. Default is DISABLED.

**Dead Call Max Seconds** -If this is set to greater than 0, after a customer hangs up and the agent hasnot clicked on the Hangup Customer button in this number of seconds, the call will automatically be hung up, the status below will be set and the agent will be paused. Default is 0 for disabled.

**Dead Call Max Status** -If Dead Call Max Seconds is enabled, this is the status set for the call when theagent dead call is not hung up past the number of seconds set above. Default is DCMX.

**Dispo Call Max Seconds** -If this is set to greater than 0, and the agent has not selected a dispositionstatus in this number of seconds, the call will automatically be set to the status below and the agent will be paused. Default is 0 for disabled.

**Dispo Call Max Status** -If Dispo Call Max Seconds is enabled, this is the status set for the call whenthe agent has not selected a status past the number of seconds set above. Default is DISMX.

**Agent Pause Max Seconds** -If this is set to greater than 0, and the agent has not gone out of PAUSEDstatus in this number of seconds, the agent will automatically be logged out of the agent screen. Default is 0 for disabled.

**Customer Gone Warning Seconds** -This setting controls the number of seconds after a customerhangs up before a warning that the customer has hung up will appear on the agent screen. Default is 30.

**Use Internal DNC List** - This defines whether this campaign is to filter leads against the Internal DNClist, 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 listthat 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 adifferent 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 PAUSEbutton in Elision Dialer agent interface. Pause codes are definable per campaign at the bottom of the campaign view detail screen and they are stored in the Elision Dialer \_agent\_log table. FORCE will force the agents to choose a PAUSE code if they click on the PAUSE button. Default is N.

**Auto Pause Pre-Call Work** - In auto-dial mode, when enabled this setting, will set the agent to pausedautomatically 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 activeautomatically 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 AgentPause 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 Elision Dialer stats refresh, even if thecampaign is not active. The Elision Dialer stats are shown on the campaign real-time report(AST\_timeonVDADall.php).

**Real- Time Agent Time Stats -** Setting this to anything but DISABLED will enable the gathering ofagent 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 anagent 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 displayedon 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 areno 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 onlyavailable 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 theownership 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 willpopulate 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, theagent 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 leadsavailable in the campaign in the agent screen. This number is updated in the system once a minute and will be refreshed on the agent screen every few seconds.

**Agent Screen Labels -** You can select a set of agent screen labels to use with this option. Default is

--SYSTEM- SETTINGS-- for the default labels. Additional labels can be created in the Admin section, by selecting the “Screen Labels” link.

**Allow Required Fields** -Must be enabled for required fields as defined in screen labels to work. Oncea field is designated as required, the agent will not be allowed to hang up a lead until there is something filled in within that field, this will affect all calls the agent receives or places. Default is N for disabled.

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

**Status Display In-Group** -This option if set to ENABLED will display the In-Group name in theagent screen when an inbound call is sent to the agent. Default is ENABLED.

**Agent Display Fields** -This option allows you to display hidden fields as read-only in the agent screen.Available fields are entry\_date, source\_id, date\_of\_birth, rank, owner, last\_local\_call\_time. Default is blank.

**Agent Display Queue Count -** If set to Y, when a customer is waiting for an agent, the Queue Callsdisplay 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 showup 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 theywant 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 theagent 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 callautomatically. Default is N.

**Agent Pause After Next Call Link** – When enabled, this displays a link on the agent screen that willallow 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 agentswhen they are logged into this campaign. NONE will follow the Users setting, ALLOW\_ALL will allow any agent logged into this campaign to place manual dial calls, DISABLE\_ALL will not allow anyone logged into this campaign to place manual dial calls. Default is NONE.

**Manual Dial Override Field** -The setting if set to ENABLED will show the Manual Dial Overridefield in the agent screen. Default is ENABLED.

**Manual Dial List ID -** The default list\_id to be used when an agent places a manual call and a newlead record is created in Elision Dialer \_list. Default is 999. This field can contain digits only.

**Manual Dial Filter** - This allows you to filter the calls that agents make in manual dial mode for thiscampaign by any combination of the following: DNC - to kick out, CAMPAIGNLISTS - the number must be within the lists for the campaign, NONE - no filter on manual dial or fast dial lists.

CAMPLISTS\_ALL - will include inactive lists in the search for the number. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number.

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

**Manual Dial Search Checkbox** -This allows you to define if you want the manual dial searchcheckbox to be selected by default or not. If an option with RESET is chosen, then the checkbox will be reset after every call. If an option with LOCK is chosen, then the agent will not be able to click on the checkbox. Default is SELECTED.

**Manual Dial Search Filter** -This allows the agent to search only within lists belonging to this campaign when the agent has the Manual Dial Search Checkbox selected in the manual dial screen. The options are, CAMPLISTS\_ONLY - will check for the number within the active lists for the campaign, CAMPLISTS\_ALL - will also include inactive lists in the search for the number, NONE - no filter on manual dial searching. Default is NONE. If a lead is not found, then a new lead will be added. WITH\_ALT will also search the Alt Phone field for the phone number. WITH\_ALT\_ADDR3 will also search the Alt Phone field and the Address 3 field for the phone number.

**Manual Dial by Lead ID** -This allows the agent in manual dial mode to place a call by lead\_id insteadof a phone number. Default is N for disabled.

**Manual Call Time Check -** If this option is enabled, it will check all manual dial calls to make surethey 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 campaigncaller 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.

**Manual Dial Timeout** -This is an override field that, if populated, will override the campaign dialtimeout setting for manual dialed calls. Default is blank for disabled.

**Phone Post Time Difference Alert -** This manual-dial-only feature, if enabled, will display an alert ifthe 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 arelogged 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 featureis not DISABLED. This option restricts the selectable In-Groups that the agent can place In-Group Manual Dial calls through. CAMPAIGN\_SELECTED will show only the in-groups that the campaign has set as allowable in-groups. ALL\_USER\_GROUP will show all of the in-groups that are viewable to the members of the user group that the agent belongs to.

**Manual Auto Next Seconds** -If the Dial Method is set to MANUAL or INBOUND\_MAN, then thissetting will trigger the next lead to be automatically be dialed after this number of seconds. If enabled, it cannot be set lower than 5 seconds. Default is 0 for disabled.

**Manual Auto Next Show Timer** -If the Manual Auto Next Seconds option above is enabled, thissetting will display a countdown timer to the agent if enabled. Default is N for disabled.

**Manual Alt Num Dialing** -This option allows an agent to manually dial the alternate phone number oraddress3 field after the main number has been called. If the option has SELECTED in it then the Alt Dial checkbox will be automatically checked for each call. If the option has TIMER in it then the Alt Phone or Address3 field will be automatically be dialed after Timer Alt Seconds. Default is N for disabled.

**Timer Alt Seconds** -If the Manual Alt Num Dialing setting has TIMER in it then the Alt Phone orAddress3 field will be automatically be dialed after this number of seconds. Default is 0 for disabled.

**Agent Screen Clipboard Copy** - THIS FEATURE IS CURRENTLY ONLY ENABLED FORINTERNET EXPLORER. This feature allows you to select a field that will be copied to the computer clipboard of the agent computer upon a call being sent to an agent. Common uses for this are to allow for easy pasting of account numbers or phone numbers into legacy client applications on the agent computer.

**3-Way Call Outbound Caller ID** - This defines what is sent out as the outbound caller ID numberfrom 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 acustomer 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 todefine 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 tohave 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 thisto 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 selectedfirst by default when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

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

**CRM Popup Address -** The web address of a CRM login page, it can have variables populated justlike 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 issent 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://dialer1.cc.Elision .com.au/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\_diale d=Y\_1&log\_to\_file\_1=1

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

If you set the Dispo Call URL field to “ALT” and submit, then a new link to the Alternate Dispo Call URL amin page will appear. This page will allow you to set multiple Dispo Call URLs that can all be executed after a call is dispositioned by an agent. This page also has more options on when to execute these Alternate Dispo Call URLs by a list of statuses and/or lists.

**No Agent Call URL -** This web URL address is not seen by the agent, but if it is populated it is calledevery 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 thephone 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 ifthey 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 beingmonitored 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 ofsomeone 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 inboundgroups 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 whenthe 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 thiscampaign can transfer calls to. Allow Closers must be enabled for this option to show up.

### LISTS WITHIN THIS CAMPAIGN

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

### DIALABLE LEADS AND LEADS IN THE HOPPER

There is a tally of the dialable leads in this campaign as well as a count of the total number of leads in the hopper. Also, below those lines is a link to see what leads are in the hopper. That report shows you more detail information on the leads in the hopper including the called count, status, phone number state and other information.

### CAMPAIGN RANKS AND CALL COUNTS

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

### TEST OUTBOUND CALL

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

### CAMPAIGN-SPECIFIC CUSTOM STATUSES

Through the use of custom campaign statuses, you can have statuses that only exist for a specific campaign. The Status must be 1-6 characters in length, the description must be 2-30 characters in length and the "Agent Selectable" field defines whether it shows up in the agent interface as a disposition. In this section of the Campaign Modification Detail screen you can add new Custom Statuses one at a time or remove existing ones by clicking on the DELETE link next to the status listing. For the Campaign's DNC and campaign-DNC list settings to work properly you must remember to properly set the Campaign and System Statuses to DNC=Y if you want the status to be a DNC-list-insert status. The human\_answered field is used when calculating the drop percentage, or abandon rate. Setting human\_answered to Y will use this status when counting the human-answered calls. The Category option allows you to group several statuses into a category that can be used for statistical analysis. There are also 7 additional settings that will define the kind of status: sale, dnc, customer contact, not interested, unworkable, scheduled callback, completed. The MIN SEC and MAX SEC fields for each status will determine whether an agent can select that status at the end of their call based upon the length of the call. If the call is 10 seconds and the MIN SEC for a status is set to 20 seconds, then the agent will not be able to select that status. Also, if a call is 40 seconds and the MAX SEC for a status is set to 30 seconds, then the agent will not be able to select that status.

### CAMPAIGN HOTKEYS

Through the use of custom campaign hotkeys, agents that use the Elision Dialer web-client can hangup and disposition calls just by pressing a single numeric key on their keyboard. You need to choose a number 1 through 9 and then select a status for that hotkey. Hotkeys are reloaded by the Elision Dialer client when the agent logs into a campaign.

There are two special HotKey options that you can use in conjunction with Alternate Phone number dialing 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. If MULTI\_LEAD is selected, then a new link will appear higher up on the Campaign Modification page that goes to a Multi-Lead Settings page where you can configure how you want the Multi-Lead auto-alt dialling to run.

### 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 dialling. You may run out of a specific groups of leads and you would be dialling leads that are not in the percentage mix that you wanted. The dialler 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 11 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 upthe phone when running a survey campaign

**Survey DTMF Digits** - This field is where you define the digits that a customer can press as an optionon a survey campaign. valid DTMF digits are 0123456789\*#

**Survey Not Interested Digit** - This field is where you define the customer digit pressed that will showthey 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 Elision Dialer internal DNC list and possibly the campaign-specific DNC list.

**Survey Wait Seconds** - the number of seconds (when in Survey mode) the system will wait, after themessage, 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-into 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 hasopted-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 surveyquestion, 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 eachDTMF digit option that the customer may select.

**Survey Xfer Extension** - If the Survey Method of EXTENSION is selected then the customer callwould be directed to this dialplan extension.

**Survey Campaign Recording Directory** - If the Survey Method of CAMPREC\_60\_WAV is selectedthen 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 ispressed by the customer.

**Survey Fourth Digit -** This allows for a fourth call path if the Fourth digit as defined in this field ispressed by the customer.

**Survey Third Audio File -** This is the third audio file to be played upon the selection by the customerof the Third Digit option.

**Survey Third Status -** This is the third status used for the call upon the selection by the customer ofthe Third Digit option.

**Survey Third Extension -** This is the third extension used for the call upon the selection by thecustomer 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 issent to if they opt-in.

**Survey Recording -** If enabled, this will start recording when the call is answered. Only recommendedif 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 statusparameters 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 specialpunctuation.

**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, percentagesand 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\_MIXwill 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 Elision Dialer 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 “Presets” link at the top to create the preset list of transfer and/or conference phone numbers. The menu allows for a Preset Name, the home number, and any additional DTMF code to follow. The number can also remain hidden from the agent. A “Presets” link appears at the bottom right corner of the agent's screen within the Transfer Conference frame(in the same place the D1-D5 buttons normally appear). When the agent clicks the link, it shows all their available preset phone numbers. Selecting the entry from the list places it in the “Number to Call” field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact\_information is enabled on your system, and is a custom feature.

### AC-CID (AREA CODE CALLER IDS)

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

### QC

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

**QC Statuses** - contains a complete list of statuses available in the campaign. Marking the checkboxindicates 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 theWEBFORM 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 areignored for these functions.

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

**QC Show Recording** - Allows for a recording that may be linked with the QC record to be displayedin 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.

1. 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.

1. ELISION DIALER LISTS

When you click on the LISTS link on the left side of the admin screen you will enter the Lists section. This starts with a full listing of every Elision Dialer list in the system with their list ID, name, campaign that they are associated with, active state and a link to the list modification page. If you want to see a count of the number of leads in each list, just click on the “show list leads counts” link at the top of the lists table. We will first look at adding a new list.

## ADD A NEW LIST

You can get to the Add List screen by clicking on the "ADD NEW LIST" link at the top of the LISTS section. When adding a new list you must make sure that you set the list ID and list name or the submission will not be accepted. Also, please make sure that the list ID you have chosen does not have any spaces, punctuation or letters, only numbers. Once you create a list you will not be able to change that list ID unless you delete the list and re-create it again with a different list ID. You cannot have duplicate list IDs in the system, and list IDs must be between 3 and 8 characters in length.

## MODIFY LISTS

**List ID** - This is the numerical name of the list, it cannot be edited after initial submission, must contain only numbers and must be between 3 and 8 characters in length. The List ID must be greater than 99.

**List Name** - This is the description of the list, it must be between 2 and 20 characters in length.

**List Description** - This is the memo field for the list. It is optional.

**Campaign -** This is the campaign that this list belongs to. A list can only be dialed on a singlecampaign at one time. If you change the campaign that this list is assigned to, all of the leads in the hopper currently will be removed to ensure no duplication of calling.

**Active -** This defines whether the list is able to be dialed on or not.

**Reset Lead-Called-Status for this list** - This resets all leads in this list to N for "not called since lastreset" and means that any lead can now be called if it is the right status as defined in the campaign screen. After you call through a list once, you need to reset the list before those leads can be called again.

**Reset Times -** This field allows you to put times in, separated by a dash-, that this list will beautomatically reset by the system. The times must be in 24 hour format with no punctuation, for example 0800-1700 would reset the list at 8AM and 5PM every day. Default is empty.

**Expiration Date -** This option allows you to set the date after which leads in this list will not beallowed to be auto-dialed or manual-list-dialed by the system. Default is 2099-12-31 (Dec 31st, 2099).

**Local Call Time** -This is a setting for this list only, where you set during which hours you would liketo dial leads within this specific list, as determined by the local time in the area in which you are calling. This is controlled by the time zone, as defined by that list setting, and is adjusted for Daylight Savings time if applicable. However, state rules are based on the state field for the lead and not only the time zone that is set. This call time setting is applied after the campaign local call time has been applied to the list and will NOT override the campaign settings. This setting will only narrow down call times in relation to the campaign local call time setting. It will NOT allow calling outside the hours set by the campaign local call time setting. This is useful if you have lists that need different call times within the same campaign. For example calling business numbers between 9am to 5pm and consumer phones between 9am to 9pm within the same campaign. General Guidelines in the USA for Business to Business is 9am to 5pm and Business to Consumer calls is 9am to 9pm. Default is campaign. In general, we do not recommend using this option on all lists. You should only use this option if you really need to, since it can add significant load to your system.

**Audit Comments** -This option allows comments to be moved to an audit table. No longer editable, butviewable along with the date-time-creator of each comment. Default is N. This is a part of the Quality Control system.

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

**List Last Call Date** - This is the last time that a lead was dialed from this list.

**Agent Script Override -** If this field is set, this will be the script that the agent sees on their screen instead of the campaign selected script or in-group selected script when the lead is from this list. Default is not set.

**Campaign CID Override -** If this field is set, this will replaces the campaign caller ID that is set forcalls that are placed to leads in this list. Default is not set.

**Answering Machine Message Override -** If this field is set, this will override the Answering MachineMessage set in the campaign for customers in this list. Default is not set.

**Drop Inbound Group Override -** If this field is set, this in-group will be used for outbound callswithin this list that drop from the outbound campaign instead of the drop in-group set in the campaign detail screen. Default is not set.

**Status Group Override** -If this field is set, this Status Group will be used instead of the campaignstatuses for calls handled by agents from this list. This does not affect System Statuses which will always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Web Form & Web Form Two/Threee-** These fields will override the respective fields on the attachedcampaign.

**No Agent Call URL** -This web URL address is not seen by the agent, but if it is populated it is calledevery 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. dispo can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank. Custom Fields are not available with this feature.

**Xfer-Conf Number Override -** These five fields allow for you to override the Transfer Conferencenumber presets when the lead is from this list. Default is blank.

**User New Lead Limit** -This setting will limit the number of new leads any user can dial in this list per day. This feature will only work properly if the campaign is set to either the MANUAL or INBOUND\_MAN Dial Method and No Hopper dialing is enabled. Default is -1 for disabled. There is a link directly below this field to a page where you can modify all of the User New Lead Limit settings for this list.

**Inventory Report -** If the Inventory Report is enabled on your system, this option will determinewhether this list is included in the report or not. Default is Y for yes.

**Time Zone Setting -** This option allows you to set the method of maintaining the current time zonelookup for the leads within this list. This process is only done at night so any changes you make will not be immediate. COUNTRY\_AND\_AREA\_CODE is the default, and will use the country code and area code of the phone number to determine the time zone of the lead. POSTAL\_CODE will use the postal code if available to determine the time zone of the lead. NANPA\_PREFIX works only in the USA and will use the area code and prefix of the phone number to determine the time zone of the lead, but this is not enabled by default in the system, so please be sure you have the NANPA prefix data loaded onto your system before selecting this option. OWNER\_TIME\_ZONE\_CODE will use the standard time zone abbreviation loaded into the owner field of the lead to determine the time zone, in the USA examples are AST, EST, CST, MST, PST, AKST, HST. This feature must be enabled by your system administrator to go into effect.

### LIST STATISTICS

On the list modification page you will see 3 different set of statistics breaking down the types of leads inside of the list. The first set of stats is a simple breakdown of the disposition status of the leads in the list and how many of each disposition have been called and have not been called. In addition the report shows Dialable and Penetration. Dialable is determined if lead the status is not flagged as UNWORKABLE or COMPLETED. While Penetration represents the percentage of leads that have either been dialed equal to the Call Count Target set in the campaign, or if the disposition has been flagged as DNC, NOT INTERESTED, UNWORKABLE, COMPLETED. The second set of stats is a breakdown of leads by timezone and whether they have been called of not. The third shows which User have been assigned as the Owner of a lead (if any) and total number of leads they own. The fourth displays the Ranks assigned to the leads and the total number of leads for each Rank. If Rank has not been assigned the leads will be listed as Rank “0”. The final set of stats is a table that breaks down the leads into both their status and how many times they have been called.

### DELETE LIST

If the option is enabled, a manager can go to the bottom of the list modification page and click on the "DELETE THIS LIST" link to remove a list from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS LIST" link to remove the list from the system. This step will also delete any leads in the system within that list.

## SEARCH FOR A LEAD

You can search for a lead by clicking on the "SEARCH FOR A LEAD" link at the top of the LISTS section. This screen simply allows you to search for a lead based upon a phone number, alternate phone number, user ID, the vendor lead code, system lead ID, lead status, list ID, owner, or the customer's first & last name. If leads are found you will see a summary of the leads information as well as a link to modify the leads and a link to do a new lead search.

## ADD A NEW LEAD

If you have permission, you can manually add a new lead into Elision Dialer . At the top of the page select the list you wish to ass the lead to, from a pulldown of selections. Enter the customer's information in to the available default lead tables. Press “submit” once you are done to save your entry and submit it to the database.

## MODIFYING A LEAD

If you have permission to alter lead information you can get to the lead modification page after searching for a lead. On this page you will see full lead detail information and will be able to edit it, including the status and whether it is defined as a callback (either USERONLY, ANYONE, & the Dates). Also on this page is a call history for this lead and a recording history for this lead, both including the user ID.

## ADD OR DELETE NUMBERS TO/FROM THE INTERNAL AND CAMPAIGN DNC LISTS

Elision Dialer has an internal Do-Not-Call(DNC) list and campaign-specific DNC lists that can be used to filter leads by as they are being added to the hopper to be called. The DNC lists work real- time if you have activated it for a specific campaign and when agents disposition a call as a status that has the DNC flag set to Y, then it is immediately added to the internal and/or campaign-specific DNC lists. Another way of adding a phone number to the DNC list is using the “Add-Delete DNC Number” link in the LISTS section. Simply enter the phone number you want to add and click submit. If the number is already in the DNC list you will see a duplicate message. The same process also works for removing phone numbers from the DNC lists. To use this functionality you must have the proper permissions in the User settings.

You also have the ability to see when and who entered a specific phone number into the DNC list by using the “DNC LOG SEARCH” feature.

Elision Dialer also offers the ability to download the complete list of DNC numbers, be it campaign specific or the internal DNC list. In the “Download numbers in this list to a file" pulldown, select the desired list & click "submit." This will export the indicated DNC list in a .txt format that can easily be open with any word processing or spreadsheet program.

### DOWNLOAD LIST

At the top of the list modification page is a link to download this list. In order to be able to do this you need to have the permission set in the User Modification page. Once you click on this link you will be presented with a “download file” window by your web browser. Simply save the file and open it in a spreadsheet program, text editor or database program to view the records. The file will contain all records in the list and all fields that are in the Elision Dialer \_list table. If the list is very large, it is possible that you may not be able to download it this way. If that happens, contact Elision Support.

## LOADING NEW LEADS

If your account has permissions for it, you can load leads into the Elision Dialer list through the web interface. You can get to the simple lead loader by clicking on the "LOAD NEW LEADS" link at the top of the LISTS section. The Elision Dialer web-based lead loader is designed simply to take a lead file - up to 8MB in size typically - that is either tab, comma, or pipe delimited and load it into the Elision Dialer \_list table. The lead loader does not perform data validation (other than removing all non-digits from the phone number and alt\_phone fields), so that is something you need to do before you load the leads. Also, make sure that you have created the list\_id that these leads are to be under so that you can use them. To associate leads with a list you can either enter a list ID in every record of the file, or you can use the list ID override field on the lead loader page to assign the same list ID to every record in the file while it imports. The Phone Code Override species the country or region code associated with the phone numbers being loaded. The Phone will also help determine the Timezone assigned to each lead.

Lead files can be imported into Elision Dialer using one of three formats; Standard, Custom Layout, and Custom Template. Standard Layout requires the lead files to arranged in the prescribed format shown here:

1. Vendor Lead Code - shows up in the Vendor ID field of the GUI
2. Source Code - internal use only for admins and DBAs
3. List ID - the list number that these leads will show up under
4. Phone Code – country code - 1 for US, 01144 for UK, 01161 for AUS, etc.
5. Phone Number - must be at least 8 digits long
6. Title - title of the customer - Mr. Ms. Mrs, etc...
7. First Name
8. Middle Initial
9. Last Name
10. Address Line 1
11. Address Line 2
12. Address Line 3
13. City
14. State - limited to 2 characters
15. Province
16. Postal Code
17. Country
18. Gender
19. Date of Birth
20. Alternate Phone Number
21. Email Address
22. Security Phrase
23. Comments
24. Rank
25. Owner

There is also an option that allows for field choosing and TXT- Plain Text, CSV- Comma Separated Values and XLS or XLSX- Excel file formats. A tab-delimited or pipe delimited text file must end with “.txt”, a CSV(Comma Separated Values) file must end with “.csv” and an Excel file must end with “.xls” or “.xlsx”. It can also take both types (.sxc & .ods) of OpenOffice.org spreadsheet formats. To use the this option you will need to select your file and then select whether you want to use the standard format (mentioned above), the custom format, or the customer template. If you select the standard format, the file will be loaded in and you will see a status display of how many leads were loaded in. If you select the custom format you will need to select the fields from the file that you want to be placed into each of the Elision Dialer fields and then click submit to load the file in. Keep in mind that when you are going through and defining which column on the imported file will be loaded into the Elision Dialer fields, any fields that are undefined will be left blank for all leads you load. Custom Template us useful when you need to import a lot of lists or you will need to load them often. To use custom template, you must 1st have a created template. If your lead files follow the same formatting, you simply build a custom template where you predefine which column on the imported file will be loaded into which table on your lists. This saves you the time of having to go through this each time you load leads. To do so, click on the link “template builder”. Under “Create a new template” click the button and select a lead list to use to build your template. Provide the template with an ID (between 2-8 characters in length), a name, and if you wish, a description. Selecting a “List ID template will load into” allows to create a template that will take advantage of custom fields you may have already created on specific lists. After you've selected the List ID you'll see that list's data tables and a series of pulldown menus appear below. Once the list file has finished loading the pulldowns will be populated with data. Simply matchup the pulldown menu option to the corresponding data field in the same row (just as you did when using custom layout). Once you've assigned all the fields that will be needed for your template, click on the “SUBMIT TEMPLATE” to build it and save your changes. From then on, you can choose “Custom Template” for “File layout to use”. Then select the template you wish to use in the “Custom template to use” pulldown menu.

NOTE : It's important not to click on any of the pulldown menus until the file of leads you are importing has fully loaded. If you do, the pulldowns will NEVER display any lead data, and you will need to refresh this page and start over from the beginning. We recommend using a small lead file

less than 100 leads) to build your template, that way you'll only have to wait a few seconds for it to load.

If you would like the lead-loader to check for and remove duplicate records as it is loading, then select the “CHECK FOR DUPLICATES BY PHONE IN LIST ID” option in the Lead Duplicate Check menu. There are also options to check for duplicates by all of a specified campaign's lists as well as a system-wide duplication check.

While loading leads, the dialer can be used to ensure that the phone numbers correctly conform to the US & Canada's existing Area Codes and Prefixes.

## LIST CUSTOM FIELDS

Create new fields to display additional information to the agents. This can also allow them to gather customer information and retain it with the lead. All customer fields will appear on the “Web Form” tab of the agent interface. Once a Custom Field is created for a List, that field will be visible on the lead loading page for that List. Use the “Copy Custom Fields” to easily copy created fields to new lists. If the lead is moved to another list (by way of a Dispo Call URL script, or another method), it will keep the custom fields associated with the initial list that it had been loaded into. If the lead was never viewed by a user prior to moving to a new list, then it will maintain the custom fields of the first list the lead was viewed from. The new custom lead tables are able to be used in any of the various API script functions, however CUSTOM FIELDS CANNOT BE USED IN A FILTER.

**New Field Rank**: The order, from the top of the page to the bottom, that the fields will appear. “NewField Rank:1” will be at the very top & successive numbers go down the page. Fields with the same rank will appear on the same row.

**Field Order:** Determines the order fields appear in the same row, starting from left to right. “Field Order: 1” would be all the way to the left & successive numbered fields will progress to the right.

**Field Label**: The lead table name for this field in the database. This can either be a brand-new field ordefault Elision Dialer field. If you choose to use a default Elision Dialer field, the name will appear in **red** once the field has been created. Examples of default fields are - *lead\_id, vendor\_lead\_code, source\_id,* *list\_id, gmt\_offset\_now, called\_since\_last\_reset, phone\_code, phone\_number, title, first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, called\_count, last\_local\_call\_time, rank, owner, user\_group*

Because this is a database table this field has a few specific name requirements

* Minimum of 2 & a maximum or 50 characters
* No spaces or punctuation (use an underscore \_ instead of spaces).

**Field Name:** What will appear for this field, to the agent on their interface. This could be as simple asthe name of the field, or a question the agent needs to read to the customer verbatim. This field is a minimum of 2 & a maximum of 50 characters. It will allow spaces, but no punctuation.

**Field Name Position:** In the agent interface, this is the position of the Field Name relative to the fielditself. If set to LEFT, the Field Name is directly to the left of the field. If set to TOP, the Field Name directly above the field.

**Field Description**: The description of this field as it will appear in the administration interface. This isan optional field with a maximum of 100 characters.

**Field Help**: What the agent will see when they press the “help+” link next to the Custom Field. Thisshould contain any additional direction you wish to provide the agent. Once the agent clicks on the link it will change to “help-”.

**Field Type**: Determines how the field will look and function. The options are:

* TEXT: a standard, single-line text entry box (mandatory additional field: Field Size, Field Max)
* AREA: a standard, multi-line text entry box (mandatory additional fields: Field Size, Field Max)
* SELECT: a single-selection pulldown menu (mandatory additional fields: Field Options)
* MULTI: a box offering multiple selections (mandatory additional fields: Field Options, Field Size) RADIO: a list of radio buttons, where only 1 option may be selected (mandatory additional field: Field Options, Option Position)
* CHECKBOX: a list of checkboxes, where multiple options may be selected ((mandatory additional
* field: Field Options, Option Position)
* DATE: a year month day calendar popup where the agent can select the date (mandatory additional
* fields: none)
* TIME: a time selection box (mandatory additional fields: none)
* DISPLAY: a display only field. This will not allow modification by the agent. This information would be on the lead when it was loaded. This type of field could also display information from a default Elision Dialer field. (mandatory additional fields: Field Size, Field Max)
* SCRIPT: A display only field. This field type can only use script variables just like in the Scripts feature. (mandatory additional fields: Field Size, Field Max)
* HIDDEN : This field type will never be visible to the agent, but will allow the field to have data imported into it and exported from it, as well as have it available to the script tab and web form address. (mandatory additional fields: Field Max)
* HIDEBLOB: similar to HIDDEN except the data storage type on the database is a BLOB type, suitable for binary data or data that needs to be secured. (mandatory additional fields: Field Max) READONLY: a display only field, it will not allow modification by the agent. This differs from the DISPLAY field type because this field MUST have the Field Label identical to a default Elision Dialer field. The “Field Default” does not work on this type of field. (mandatory additional fields: Field Size, Field Max)

**Field Options**: For the SELECT, MULTI, RADIO and CHECKBOX field types, you must define theoption values in this box. Place the comma separated option label (how it appears in the database) & option text (how it appears in the agent interface) with each option, on its own line. The first value should have no capitalization or spaces in it (use an underscore instead), & neither value should have any punctuation.

For example:

electric\_meter, Electric Meter

mortgage\_rate, Mortgage Rate

income\_level, Income Level

**Option Position**: For the CHECKBOX & RADIO fields, this will determine how their multipleselections are oriented.

**Field Size**: This has 2 different effects depending on the Field Type.

* TEXT, AREA Fields: This determines the width of the text box, in characters, on the agent's screen.
* MULTI Fields: This defines the number of options visible in the list.

(This is unused for the remaining Field Types

**Field Max**: This has 2 different effects depending on the Field Type.

* TEXT, HIDDEN, READONLY Fields: This is the maximum number of characters allowed in the field.
* AREA Fields: This is the number of rows tall the text box on the Agent's screen will be. (This is unused for the remaining Field Types)

**Field Default**: An optional field, this lets you define what value to assign to a field if nothing is loadedinto it. This field does not work with the READONLY “Field Type”. Default is NULL, which disables the field.

* DATE field types: the default is always set to today unless a number is put in in which case the date will be that many days plus or minus today.
* TIME field types, the default is always set to the current server time unless a number is put in in which case the time will be that many minutes plus or minus current time.

**Field Required**: This field is still in development, and is not yet functional.

**Field Cost**: The cost of the customer field for this list, based on the size and complexity. The per fieldcost limit is 999, simply because the Field Cost indicator will not exceed 3 digits. When creating a field that large, we recommend using the AREA type since it maintains a very small fixed cost no matter how much data is going to be entered into it. The maximum cost per list, for all Custom Fields, should never exceed 65,000.

After entering a new Custom Field entry, check the top of the page for any errors. The error message will indicate what needs to be corrected before the entry is complete and ready for use. Keep in mind, some errors will allow the field to appear in the Customer Fields listing, but not within the database.

Please Be Aware

-The following words CANNOT be used as field labels for Custom Fields because they are database reserved words:

accessible, action, add, all, alter, analyze, and, as, asc, asensitive, before, between, bigint, binary, bit, blob, both, by, call, cascade, case, change, char, character, check, collate, column, condition, constraint, continue, convert, create, cross, current\_date, current\_time, current\_timestamp,current\_user, cursor, database, databases, date, day\_hour, day\_microsecond, day\_minute, day\_second, dec, decimal, declare, default, delayed, delete, desc, describe, deterministic, distinct,

distinctrow, div, double, drop, dual, each, else, elseif, enclosed, enum, escaped, exists, exit, explain,false, fetch, float, float4, float8, for, force, foreign, from, fulltext, grant, group, having, high\_priority, hour\_microsecond, hour\_minute, hour\_second, if, ignore, in, index, infile, inner, inout, insensitive,insert, int, int1, int2, int3, int4, int8, integer, interval, into, is, iterate, join, key, keys, kill, leading,

leave, left, like, limit, linear, lines, load, localtime, localtimestamp, lock, long, longblob, longtext, loop, low\_priority, master\_ssl\_verify\_server\_cert, match, mediumblob, mediumint, mediumtext, middleint,minute\_microsecond, minute\_second, mod, modifies, mysql, natural, no, no\_write\_to\_binlog, not, null,numeric, on, optimize, option, optionally, or, order, out, outer, outfile, precision, primary, procedure,

purge, range, read, read\_only, read\_write, reads, real, references, regexp, release, remove, rename,repeat, replace, require, restrict, return, revoke, right, rlike, schema, schemas, second\_microsecond,select, sensitive, separator, set, show, smallint, spatial, specific, sql, sql\_big\_result,

sql\_calc\_found\_rows, sql\_small\_result, sqlexception, sqlstate, sqlwarning, ssl, starting, straight\_join,table, terminated, text, then, time, timestamp, tinyblob, tinyint, tinytext, to, trailing, trigger, true, undo,

union, unique, unlock, unsigned, update, usage, use, using, utc\_date, utc\_time, utc\_timestamp, values,varbinary, varchar, varcharacter, varying, when, where, while, with, write, xor, year\_month, zerofill,

partition.

This means that the whole field label cannot be one of the words above, however they can be used as part of a field label, i.e. "*repeat\_session*" would be OK, while "*repeat*" would not.

-The word "*status*" should NEVER be used as a custom field label because that could be overidden by whatever disposition the agent chooses, once the call is over.

-We strongly recommend NOT using the following field labels:

lead\_id, list\_id, gmt\_offset\_now, called\_since\_last\_reset, gender, comments, called\_count, last\_local\_call\_time, status, entry\_date, entry\_list\_id, modify\_date, user

Using the above fields as field labels in custom fields can result in issues and inconsistent data entry, so we do not recommend using them.

1. ELISION DIALER SCRIPTS

When you click on the SCRIPTS link on the left side menu bar of the admin screen you will enter the Scripts section. This starts with a full listing of every Elision Dialer script in the system with their script ID, name and a link to the script modification page. We will first look at adding a new script.

## ADD A NEW SCRIPT

You can get to the Add Script screen by clicking on the "ADD SCRIPT" link at the top of the SCRIPTS section. When adding a new script you must make sure that you set the script ID and script name or the submission will not be accepted. Also, please make sure that the script ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a script you will not be able to change that script ID unless you delete the script and re-create it again with a different script ID. You cannot have duplicate script IDs in the system, and script IDs must be between 2 and 10 characters in length.

In the scripts text section you can enter in specific flags to note that a field from the list should be populated in the script when it is displayed in the Elision Dialer agent screen.

## MODIFY SCRIPT

From the Script modification page you have the ability to click on the "Preview Script" link to see what your script will look like in the agent screen with the dynamic fields filled in with sample data.

**Script ID** - This is the short name of a Elision Dialer Script. This needs to be a unique identifier. Do not to use any spaces or punctuation for this field. max 10 characters, minimum of 2 characters.

**Script Name** - This is the title of a Elision Dialer Script. This is a short summary of the script. max 50characters, minimum of 2 characters. There should be no spaces or punctuation of any kind in this field.

**Script Comments** - This is where you can place comments for a Elision Dialer Script such as "changed tofree upgrade on Sept 23". Maximum 255 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this script, and allows admin viewingonly to the indicated user group. Default is --ALL-- which allows any admin user to view the script.

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

**Script Color** -This determines the background color of the script as displayed in the agent screen. default is white.

**Script Text** - This is where you place the content of a Elision Dialer Script. Minimum of 2 characters. In addition to being able to use basic HTML tags, you can have customer information be auto-populated

in this script using "--A--field--B--" where field is one of the following field names: vendor\_lead\_code,

source\_id, list\_id, gmt\_offset\_now, called\_since\_last\_reset, phone\_code, phone\_number, title,

first\_name, middle\_initial, last\_name, address1, address2, address3, city, state, province, postal\_code,

country\_code, gender, date\_of\_birth, alt\_phone, email, security\_phrase, comments, call\_id,

user\_group. For example, this sentence would print the persons name in it:

Hello, can I speak with <B>--A--first\_name--B-- --A--last\_name--B-- please? Well hello --A--title--B-- --A--last\_name--B-- how are you today?

This would read----

Hello, can I speak with **John Doe** please? Well hello Mr. Doe how are you today?

You can also use an iframe to load a separate window within the SCRIPT tab, here is an example with prepopulated variables:

<iframe src="http://astguiclient.sf.net/test\_VICIdial\_output.php?lead\_id=--A--

lead\_id--B--&vendor\_id=--A--vendor\_lead\_code--B--&list\_id=--A--list\_id--B--

&gmt\_offset\_now=--A--gmt\_offset\_now--B--&phone\_code=--A--phone\_code--B--

&phone\_number=--A--phone\_number--B--&title=--A--title--B--&first\_name=--A--

first\_name--B--&middle\_initial=--A--middle\_initial--B--&last\_name=--A--last\_name--

B--&address1=--A--address1--B--&address2=--A--address2--B--&address3=--A--

address3--B--&city=--A--city--B--&state=--A--state--B--&province=--A--province--B--

&postal\_code=--A--postal\_code--B--&country\_code=--A--country\_code--B--&gender=--A--

gender--B--&date\_of\_birth=--A--date\_of\_birth--B--&alt\_phone=--A--alt\_phone--B--

&email=--A--email--B--&security\_phrase=--A--security\_phrase--B--&comments=--A--

comments--B--&user=--A--user--B--&campaign=--A--campaign--B--&phone\_login=--A--

phone\_login--B--&fronter=--A--fronter--B--&closer=--A--user--B--&group=--A--group--

B--&channel\_group=--A--group--B--&SQLdate=--A--SQLdate--B--&epoch=--A--epoch--B--

&uniqueid=--A--uniqueid--B--&customer\_zap\_channel=--A--customer\_zap\_channel--B--

&server\_ip=--A--server\_ip--B--&SIPexten=--A--SIPexten--B--&session\_id=--A--

session\_id--B--&phone=--A--phone--B--" style="width:460;height:290;backgroundcolor:

transparent;" scrolling="auto" frameborder="0" allowtransparency="true"

id="popupFrame" name="popupFrame" width="460" height="290"> </iframe>

## DELETE SCRIPT

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

1. ELISION DIALER FILTERS

Filters allow you to more finely select the leads that you want to call in your outbound dialing campaign. Within a filter you will use a small piece of a database language known as SQL (Structured Query Language) to fine tune your leads to dial from.

When you click on the FILTERS link on the left side menu bar of the admin screen you will enter the Filters section. This starts with a full listing of every Elision Dialer filter in the system with their filter ID, name and a link to the filter modification page. We will first look at adding a new filter.

It is very important before you enable a filter on a campaign or user, that you test it to confirm that there will still be leads available using the “TEST ON CAMPAIGN” feature on the Filter Modification page.

## ADD A NEW FILTER

You can get to the Add Filter screen by clicking on the "ADD FILTER" link at the top of the FILTERS section. When adding a new filter you must make sure that you set the filter ID and filter name or the submission will not be accepted. Also, please make sure that the filter ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a filter you will not be able to change that filter ID unless you delete the filter and re-create it again with a different filter ID. You cannot have duplicate filter IDs in the system, and filter IDs must be between 2 and 10 characters in length.

## MODIFY FILTER

From the Filter modification page you have the ability to click on the "Test On Campaign" form at the bottom of the page to preview how many leads in a specific campaign you can expect to be able to dial if this filter is enabled.

**Filter ID** - This is the short name of a Elision Dialer Lead Filter. This needs to be a unique identifier. Do notuse any spaces or punctuation for this field. max 10 characters, minimum of 2 characters.

**Filter Name** - This is a more descriptive name of the Filter. This is a short summary of the filter. max30 characters, minimum of 2 characters.

**Filter Comments** - This is where you can place comments for a Elision Dialer Filter such as "calls allCalifornia leads". Maximum 255 characters, minimum of 2 characters.

**Admin User Group** - This is the administrative user group for this filter, and allows admin viewingonly to the indicated user group. Default is --ALL-- which allows any admin user to view the filter.

**Filter SQL** - This is where you place the SQL query fragment that you want to filter by. do not beginor end with an AND, that will be added by Elision Dialer automatically. Here are some example SQL queries that would work here:

called\_count > 4 and called\_count < 8

called\_count IN('8','9','10','11')

state IN('NY','NJ')

## DELETE FILTER

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

1. ELISION DIALER INBOUND IN-GROUPS

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

When you click on the IN-GROUPS link on the left side of the admin screen you will enter the In-groups section. This starts with a full listing of every Elision Dialer inbound group in the system with their in-group ID, name, ranking priority, active status, administrative group, call time, in-group display color and a link to the in-group modification page. We will first look at adding a new in-group.

## ADD A NEW IN-GROUP

You can get to the Add In-Group screen by clicking on the "ADD A NEW IN-GROUP" link at the top of the IN-GROUPS section. When adding a new in-group you must make sure that you set the in-group ID and in-group name or the submission will not be accepted. Also, please make sure that the in-group ID you have chosen does not have any spaces or wild card punctuation; only letters, numbers or underscores "\_" are permitted. Once you create a in-group you will not be able to change that in-group ID unless you delete the in-group and re-create it again with a different in-group ID. In-groups Ids must be unique, even from the Campaigns IDs. The in-group IDs must be between 2 and 20 characters in length.

## COPY AN IN-GROUP

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

## MODIFY IN-GROUP

**Group ID** - This is the short name of the inbound group, it is not editable after initial submission, mustnot contain any spaces and must be between 2 and 20 characters in length. The Group\_id needs to match up with the first variable in the dialplan for an inbound call.

**Group Name** - This is the description of the group, it must be between 2 and 30 characters in length. Cannot include dashes, pluses or spaces .

**Group Color** - This is the color that displays in the Elision Dialer client application when a call comes in onthis group. It must be between 2 and 7 characters long. If this is a hex color definition you must remember to put a # at the beginning of the string or Elision Dialer will not work properly.

**Active** - This determines whether this group shows up in the selection box when a Elision Dialer agent logsin.

**In-Group Calldate -** This is the last date and time that a call was directed to this inbound group.

**Admin User Group** - This is the administrative user group for this inbound group, this allows adminviewing of this in-group restricted by user group. Default is --ALL-- which allows any admin user to view this in-group.

**Web Form** - This is the custom address that clicking on the WEB FORM button in Elision Dialer will takeyou to for calls that come in on this group. The “web form” address can use custom variables just like the Script functionality. To activate custom variables in the web form you just need to put “VAR” at the front of the URL, for example:

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

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

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

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

user.

**Next Agent Call** - This determines which available agent will receive the next call:

* random: orders by the random update value in the Elision Dialer \_live\_agents table
* oldest\_call\_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
* oldest\_call\_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
* oldest\_inbound\_call\_start: orders by the last time an agent was sent an inbound call. Results in agents receiving about the same number of calls overall.
* oldest\_inbound\_call\_finish: orders by the last time an agent finished an inbound call. AKA agent waiting longest receives first call.
* overall\_user\_level: orders by the user\_level of the agent as defined in the Elision Dialer \_users table a higher user\_level will receive more calls.
* inbound\_group\_rank: orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
* campaign\_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
* ingroup\_grade\_random: orders based on probability of the available agent's assigned grades for this ingroup.
* campaign\_grade\_random: orders based on probability of the available agent's assigned grades for this campaign.
* fewest\_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
* fewest\_calls\_campaign: orders by the number of calls received by an agent for the campaign. Least calls first.
* longest\_wait\_time: orders by the amount of time agent has been actively waiting for a call.
* ring\_all: rings all available agents until one picks up the phone.

**Queue Priority** - This defines the order in which the calls from this inbound group should be answeredin relation to calls from other inbound groups and possibly outbound campaign calls if this is a blended campaign.

**On-Hook Ring Time** - This option is only used for agents that are logged in with phones that have theagent-on-hook feature enabled. This is the number of seconds that each call attempt to the agent will ring for until the system will wait one second and start ringing the available agent phones again. This field can be overridden if the agent phones are set to a lower ring time which may be necessary to prevent calls from being sent one phones voicemail. Default is 15.

**On-Hook CID** - TUsed for agents that are logged in with phones that have the agent-on-hook feature enabled, this is the caller ID that will show up on their phones while the calls are ringing. GENERIC is a generic RINGAGENT00000000001 type of notification. INGROUP will show only the in-group the call came from. CUSTOMER\_PHONE will show only the customer phone number. CUSTOMER\_PHONE\_RINGAGENT will show RINGAGENT\_3125551212 with the RINGAGENT as part of the CID a long with the customer phone number. CUSTOMER\_PHONE\_INGROUP will show the first 10 characters of the in-group followed by the customer phone number. Default is GENERIC.

**Fronter Display** - This determines whether the inbound Elision Dialer agent would have the fronter agent'sname, if there is one, displayed in the Status field when the call comes to the agent.

**In-Group Script** - This menu allows you to choose the script that will appear on the agents' screens forthis campaign. Select NONE to leave the agent's script tab blank.

**Ignore List Script Override-** This option allows you to ignore the list ID Script Override option forcalls coming into this In-Group. Setting this to Y will ignore any List ID script settings. Default is N.

**Status Group Override** -If this field is set, this Status Group will be used instead of the campaignstatuses for calls handled by agents from this inbound group. This does not affect System Statuses which will always be shown. Statuses defined within this status group will not be available with Campaign HotKeys unless they are defined in Campaign Statuses. Default is not set.

**Get Call Launch** - This menu allows you to choose whether you want to auto-launch either of theweb-form pages in a separate window, auto-switch to the SCRIPT or FORM tabs, or do nothing when a call is sent to the agent for this campaign.

**Group Handling** -This menu allows you to choose what type of inbound activity this group shouldhandle. PHONE means this in-group is for handling phone calls and will show under the In-Group section. EMAIL is for handling incoming emails and will cause the group to be listed under the Email Group section. CHAT is for handling customer chats and will cause the group to be listed under the Email Group section

**Transfer-Conf DTMF** - These seven fields allow for you to have two sets of Transfer Conference andDTMF presets and three additional number presets. When the call or campaign is loaded, the Elision Dialer Agent Screen will show five links on the transfer-conference frame("D1" through "D5") and auto-populate the number- to-dial and the send-dtmf fields when the links are clicked on. If you want to allow Blind transfers of customers to a Elision Dialer AGI script for logging or an IVR, then place AXFER in the number-to-dial field. You can also specify an custom extension after the AXFER, for instance if you want to do Custom AGI IVR script you would put AXFER82904 in the number-to-dial field(assuming that \_82904. is in your dialplan). Consultative transfers no longer need to use the CXFER prefix now that there is a CONSULTATIVE checkbox option on the Agent screen.

**Timer Action -** This feature allows you to trigger actions after a certain amount of time. the D1 and D2DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE\_ONLY will simply display the message that is in the field below. NONE will disable this feature and is the default. This setting will override the Campaign settings. HANGUP will hang up the call when the timer is triggered, CALLMENU will send the call to the Call Menu specified in the Timer Action Destination field, EXTENSION will send the call to the Extension that is specified in the Timer Action Destination field, IN\_GROUP will send the call to the In-Group specified in the Timer Action Destination field.

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

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

**Timer Action Destination** - This field indicates the Call Menu, Extension or In-Group the call will sent to, if the Time Action is set to CALLMENU, EXTENSION or IN\_GROUP. Default is empty.

**Drop Call Seconds** - The number of seconds from the time the customer line is picked up until the callis considered a DROP and routes the call to the Drop Action (listed below).

**Drop Action** – Routes the customer call after it reaches the Drop Call Seconds (time limit) for the In-group. HANGUP will simply hang up the call, MESSAGE will send the call the Drop Exten that you have defined below, VOICEMAIL will send the call to the voicemail box that you have defined below, IN\_GROUP will send the call to the Inbound Group that is defined below, and CALLMENU will route to the menu indicated in the “Drop Call Menu” field.

**Drop Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when thecall is dropped and sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Drop Exten** - If Drop Action is set to MESSAGE, this is the dial plan extension that the call will besent to if it reaches Drop Call Seconds.

**Voicemail** - If Drop Action is set to VOICEMAIL, the call DROP would instead be directed to thisvoicemail box to hear and leave a message. In an AGENTDIRECT in-group, setting this to AGENTVMAIL will select the User voicemail ID to use.

**Drop Transfer Group** - If Drop Action is set to IN\_GROUP, the call will be sent to this inboundgroup if it reaches Drop Call Seconds.

**Drop Call Menu** - If Drop Action is set to CALLMENU, the call will be sent to this call menu if itreaches Drop Call Seconds.

**Call Time -** This is the call time scheme to use for this inbound group. Keep in mind that the time isbased on the server time. Default is 24hours. See the Call Times Admin section for more information. Directly below this option, you will see a count of how many Holiday entries are defined for the Call Time that is selected for this In-Group.

**Action Transfer CID** - Used for Drop, After-hours and No-agent-no-queue actions. This is the callerID number that the call uses before it is transferred to extensions, messages, voicemail or call menus. You can use CUSTOMER in this field to use the customer phone number, or CAMPAIGN to use the first allowed campaign caller id number. If this is a call that will go to a Call Menu and then back to an in-group, we suggest you use CUSTOMERCLOSER in this field, and also you need to set the In-Group Search Method in the Call Menu to CLOSER. Default is CUSTOMER.

**After Hours Action -** The action to perform if it is after hours as defined in the call time for thisinbound group. HANGUP will immediately hangup the call, MESSAGE will play the file in the After Hours Message Filename field, EXTENSION will send the call to the After Hours Extension in the dialplan and VOICEMAIL will send the call to the voicemail box listed in the After Hours Voicemail field, IN\_GROUP will send the call to the inbound group selected in the After Hours Transfer Group, and CALLMENU will route to the menu indicated in the “After Hours Call Menu” field.. Default is MESSAGE.

**After Hours Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field to N when the call is after hours and sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**After Hours Message Filename -** The audio file located on the server to be played if the Action is setto MESSAGE. Default is vm-goodbye

**After Hours Extension -** The dialplan extension to send the call to if the Action is set toEXTENSION. Default is 8300.

**After Hours Voicemail -** The voicemail box to send the call to if the Action is set to VOICEMAIL.+

**After Hours Transfer Group** - If After Hours Action is set to IN\_GROUP, the call will be sent to thisinbound group if it enters the in-group outside of the call time scheme defined for the in-group.

**After Hours Call Menu** - If After Hours Action is set to CALLMENU, the call will be sent to this CallMenu if it enters the in-group outside of the call time scheme defined for the in-group.

**No Agents No Queueing –** Determines the call routing for an ingroup during normal business hours, if

none of the agents have logged in to take calls. If set to N, the calls will queue up, waiting for agents to

log in. If set to Y, it will follow the "No Agent No Queue Action" indicated below. IF set to

NO\_PAUSED, it will route to the "No Agent No Queue Action" if agents are logged in, but in "Pause"

status. Default is N.

**No Agent No Queue Action -** If No Agent No Queue is enabled, then this field defines where the callwill go if there are no agents in the In-Group. Default is MESSAGE, this plays the sound files in the Action Value field and then hangs up. Depending on the “No Agent No Queue Action” selected, a complimentary routing field will appear below to indicate where the call should be sent.

**No Agent No Queue Lead Reset** -This option if set to Y, will set the lead called-since-last-reset fieldto N when No agent no queue is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Max Calls Method** - allows for a cap on concurrent calls being handled by each in-group, either intotal or per queue.

**Max Calls Count** – This option must be set higher than 0 if you want to use the Max Calls Methodfeature. Default is 0.

**Max Calls Action - T**he action taken when the Max Calls Method is enabled and the number of callsexceeds the Max Calls Count setting. Calls above that amount will either be sent to either the DROP action, the AFTERHOURS action, or the NO\_AGENT\_NO\_QUEUE action. Calls will be logged as a MAXCAL status with a MAXCALLS hangup reason. Default is NO\_AGENT\_NO\_QUEUE.

**Welcome Message Filename -** The audio file located on the server to be played when the call comesin. If set to ---NONE--- then no message will be played. Default is ---NONE---

**Play Welcome Message** - These settings select when to play the defined welcome message, ALWAYSwill play it every time, NEVER will never play it, IF\_WAIT\_ONLY will only play the welcome message if the call does not immediately go to an agent, and YES\_UNLESS\_NODELAY will always play the welcome message unless the NO\_DELAY setting is enabled. Default is ALWAYS.

**Music On Hold Context -** The music on hold context to use when the customer is placed on hold.Default is default. You can select, from the “moh chooser”, one of the music on hold contexts that are in your Admin → Music On Hold listings.

**On Hold Prompt Filename -** The audio file located on the server to be played at a regular intervalwhen the customer is on hold. Default is generic\_hold. This audio file MUST be 9 seconds or less in length. We usually recommend that you put any message that you want a customer to hear into a Music On Hold context instead of using an On-Hold Prompt. This is because while the On Hold Prompt is playing, the customer cannot be sent to an agent, unlike with Music On Hold, which can be interrupted to send a customer to an agent.

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

**On Hold Prompt No Block** - Setting this option to Y will allow calls in line behind a call where the onhold prompt is playing to go to an agent if one becomes available while the message is playing. While the On Hold Prompt Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**On Hold Prompt Seconds -** This field needs to be set to the number of seconds that the On HoldPrompt Filename plays for. Default is 10.

**Play Place in Line** - This defines whether the caller will hear their place in line when they enter thequeue as well as when they hear the announcement. Default is N.

**Play Estimated Hold Time** - This defines whether the caller will hear the estimated hold time beforethey are transferred to an agent. Default is N.

**Calculate Estimated Hold Seconds -** This defines the number of seconds into the queue that thecustomer will wait before the Estimated Hold Time will be calculated and optionally played. Minimum is 3 seconds, even if set lower than 3. Default is 0.

**Estimated Hold Time Minimum Filename -** If the Estimated Hold Time is active and it is calculatedto be at or below the minimum of 15 seconds, then this prompt file will be played instead of the default announcement. Default is Empty for inactive.

**Estimated Hold Time Minimum Prompt No Block -** If Estimated Hold Time is active and theEstimated Hold Time Minimum Filename field above is filled-in, then this option to allow calls in line behind a call where the prompt is playing to go to an agent if one becomes available while the message is playing. While the prompt is playing to a customer they cannot be sent to an agent. Default is N.

**Estimated Hold Time Minimum Prompt Seconds -** This field needs to be set to the number ofseconds that the Estimated Hold Time Minimum Filename prompt plays for. Default is 10.

**Wait Time Option -** This allows you to give customers options to leave the queue if their wait time exceeds the amount of seconds specified below. Default is NONE. If one of the PRESS\_ options is selected, it will play the Press Filename defined below and give the customer the option to press 1 on their phone to leave the queue and run the selected option. The PRESS\_STAY option will send the customer back to the queue without loosing their place in line.

**Wait Time Second Option -** Same as the first Wait Time Option field above, except this one willcheck for the customer pressing the 2 key. Default is NONE. If no first Wait Time Option is selected then this option will not be offered.

**Wait Time Third Option -** Same as the first Wait Time Option field above, except this one will checkfor the customer pressing the 3 key. Default is NONE. If no Second Wait Time Option is selected then this option will not be offered.

**Wait Time Option Seconds -** If Wait Time Option is set to anything but NONE, this is the number ofseconds that the customer has been waiting in queue that will trigger the wait time options. Default is 120 seconds.

**Wait Time Option Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field toN when the Wait Time Option is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Wait Time Option Extension -** If Wait Time Option is set to PRESS\_EXTEN, this is the dialplanextension that the call will be sent to if the customer presses the option key when presented with the option. For AGENTDIRECT in-groups, you can put AGENTEXT in this field and the system will look up the user custom five field and send the call to that dialplan number.

**Wait Time Option Callmenu -** If Wait Time Option is set to PRESS\_CALLMENU, this is the CallMenu that the call will be sent to if the customer presses the option key when presented with the option.

**Wait Time Option Voicemail -** If Wait Time Option is set to PRESS\_VMAIL, this is the voicemailbox that the call will be sent to if the customer presses the option key when presented with the option. In an AGENTDIRECT in-group, setting this to AGENTVMAIL will select the User voicemail ID to use.

**Wait Time Option Transfer In-Group -** If Wait Time Option is set to PRESS\_INGROUP, this is theinbound group that the call will be sent to if the customer presses the option key when presented with the option.

**Wait Time Option Press Filename -** If Wait Time Option is set to one of the PRESS\_ options, this isthe filename prompt that is played if the customer wait time exceeds the Wait Time Option Seconds to give the customer the option to press 1, 2 or 3 on their phone to run the selected Wait Time Press options. It is very important that you include options in the audio file for all of your selected Wait Time Options, and that the audio file length in seconds is properly defined in the Filename Seconds field below; or there will be problems. Default is to-be-called-back.

**Wait Time Option Press No Block -** Setting this option to Y will allow calls in line behind a callwhere the Wait Time Option Press Filename prompt is playing to go to an agent, if one becomes available while the message is playing. While the Wait Time Option Press Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**Wait Time Option Press Filename Seconds -** This field needs to be set to the number of seconds thatthe Wait Time Option Press Filename plays for. Default is 10.

**Wait Time Option After Press Filename -** If Wait Time Option is set to one of the PRESS\_ options,this is the filename prompt that is played after the customer has pressed 1, 2 or 3.

**Wait Time Option Callback List ID -** If Wait Time Option is set to PRESS\_CID\_CALLBACK, thisis the List ID the call is added to as a new lead if the customer presses the option key when presented with the option.

**Wait Hold Option Priority -** If both Estimated Hold Time options and Wait Time options are active,this setting will define whether one, the other or both of these features are active. For example, if the Estimated Hold Time Option is set to 360, the Wait Time option is set to 120 and the customer has been waiting for 120 seconds and there are still 400 seconds estimated hold time, then they are both active at the same time and this setting will be checked to see what options will be offered. Default is WAIT only.

**Estimated Hold Time Option** - This allows you to specify the routing of the call if the estimated holdtime is over the amount of seconds specified below. Default is NONE.

**Hold Time Second Option -** Same as the first Hold Time Option field above, except this one willcheck for the customer pressing the 2 key. Default is NONE. If no first Hold Time Option is selected, then this option will not be offered.

**Hold Time Third Option -** Same as the first Hold Time Option field above, except this one will checkfor the customer pressing the 3 key. Default is NONE. If no Second Hold Time Option is selected then this option will not be offered.

**Hold Time Option Seconds** - If Hold Time Option is set to anything but NONE, this is the number ofseconds of estimated hold time that will trigger the hold time option. Default is 360 seconds.

**Hold Time Option Lead Reset** -This option if set to Y, will set the lead called-since-last-reset field toN when the Hold Time Option is triggered and the call is sent to an action like Message, Voicemail or Hangup. Default is N for disabled.

**Hold Time Option Minimum** - If Hold Time Option enabled, this is the minimum number of secondsthe call must be waiting before it will be presented with the hold time option. The hold time option will immediately be presented at this time if the estimated hold time is greater than the Hold Time Option Seconds value. Default is 0 seconds.

**Hold Time Option Extension** - If Hold Time Option is set to EXTENSION, this is the dialplanextension that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Callmenu** - If Hold Time Option is set to CALL\_MENU, this is the Call Menuthat the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Voicemail** - If Hold Time Option is set to VOICEMAIL, this is the voicemail boxthat the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Transfer In-Group** - If Hold Time Option is set to IN\_GROUP, this is theinbound group that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Callback Filename** - If Hold Time Option is set to CALLERID\_CALLBACK,this is the filename prompt that is played before the call is logged as a new lead to the list ID specified below if the estimated hold time exceeds the Hold Time Option Seconds.

**Hold Time Option Press No Block** - Setting this option to Y will allow calls in line behind a callwhere the Hold Time Option Press Filename prompt is playing to go to an agent if one becomes available while the message is playing. While the Hold Time Option Press Filename message is playing to a customer they cannot be sent to an agent. Default is N.

**Hold Time Option Press Filename Seconds -** This indicates the length of the Hold Time OptionMessage to Elision Dialer . This fields should be set to the number of seconds that the Hold Time Option Press Filename plays for. Default is 10.

**Hold Time Option After Press Filename -** If Hold Time Option is set to one of the PRESS\_ optionsor CALLERID\_CALLBACK, this is the filename prompt that is played after the customer has pressed 1 or the call has been added to the callback list.

**Hold Time Option Callback List ID** - If Hold Time Option is set to CALLERID\_CALLBACK, thisis the List ID the call is added to as a new lead if the estimated hold time exceeds the Hold Time Option Seconds.

**Agent Alert Filename -** The audio file to play to an agent to announce that a call is coming to theagent. To not use this function set this to X. Default is ding.

**Agent Alert Delay -** The length of time in milliseconds to wait before sending the call to the agentafter playing the on Agent Alert Extension. Default is 1000.

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

**Default Group Alias** - If you have allowed Group Aliases for the campaign, then this is the group aliasthat is selected first by default on a call coming in from this inbound group when the agent chooses to use a Group Alias for an outbound manual call. Default is NONE or empty.

**Dial In-Group CID** - If the agent campaign allows for Manual In-Group Dialing, the contents of thisfield (if populated) will be sent as the outgoing CID of the phone call, overriding the campaign settings and list CID override setting. Default is empty.

**Hold Recall Transfer In-Group** - If a customer calls back to this in-group more than once and this isnot set to NONE, then the call will automatically be sent on to the In-Group selected in this field. Default is NONE.

**No Delay Call Route -** Setting this to Y will remove all wait times and audio prompts, attempt to sendthe call right to an agent. Does not override welcome message or on hold prompt settings. Default is N.

**In-Group Recording Override** - This field allows for the overriding of the campaign call recordingsetting. This setting can be overridden by the Elision Dialer \_user recording override setting. DISABLED will not override the campaign recording setting. NEVER will disable recording on the client.

ONDEMAND is the default and allows the agent to start and stop recording as needed. ALLCALLS will start recording on the client whenever a call is sent to an agent. ALLFORCE will start recording on the client whenever a call is sent to an agent giving the agent no option to stop recording.

**In-Group Recording Filename** - This field will override the Campaign Recording Filenaming Schemeunless it is set to NONE. The allowed variables are CAMPAIGN CUSTPHONE FULLDATE TINYDATE EPOCH AGENT INGROUP. 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. Default is NONE.

**Routing Initiated Recording** -This option, if enabled, allows you to have the call routing script forInbound calls trigger the agent call recording instead of the agent screen. This option will only work if the recording option is set to ALLCALLS or ALLFORCE. This will not work with inbound on-hook agents. Default is N for disabled.

**Stats Percent of Calls Answered Within X seconds** - This field allows you to set the number of holdseconds that the realtime stats display will use to calculate the percentage of answered calls that were answered within X number of seconds on hold.

**Stats Percent of Calls Answered Within X seconds** 2 – This allows you to set a second threshold forhold seconds on the real-time display.

**Start Call URL -** If it is populated, this web URL address is not seen by the agent, but it is called everytime a call is sent to an agent. Uses the same variables as the web form fields and scripts. Default is blank.

**Dispo Call URL -** If it is populated, this web URL address is not seen by the agent, but it is calledevery time a call is sent to an agent. Uses the same variables as the web form fields and scripts. dispo and talk\_time are the variables you can use to retrieve the agent-defined disposition for the call and the actual talk time in seconds of the call. Default is blank.

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\_diale d=Y\_1&log\_to\_file\_1=1

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

If you set the Dispo Call URL field to “ALT” and submit, then a new link to the Alternate Dispo Call URL amin page will appear. This page will allow you to set multiple Dispo Call URLs that can all be executed after a call is dispositioned by an agent. This page also has more options on when to execute these Alternate Dispo Call URLs by a list of statuses and/or lists.

**Add Lead URL** - This web URL address is not seen by the agent, but it is called every time a lead isadded to the system through the inbound process. Default is blank. You must begin this URL with VAR if you want to use variables, and of course --A-- and --B-- around the actual variable in the URL where you want to use it. Here is the list of variables that are available for this function. lead\_id, vendor\_lead\_code, list\_id, phone\_number, phone\_code, did\_id, did\_extension, did\_pattern, did\_description, uniqueid

**No Agent Call URL -** This web URL address is not seen by the agent, but if it is populated it is calledevery 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. 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 coming in from this in-group will have a space and thephone extension of the agent appended to the end of the CallerID name for the call before it is sent to the agent. Default is N for disabled.

**Uniqueid Status Display** - If enabled, when an agent receives a call through this in-group they will seethe uniqueid of the call added to the status line in their agent interface. The PREFIX option will add the prefix defined blow to the beginning of the Uniqueid in the display. Default is DISABLED. If there was already a Uniqueid defined on a call entering this in-group, then the original Uniqueid will be displayed. If the PRESERVE option is used and the call is sent to a second agent, the Uniqueid and prefix displayed to the first agent will also be displayed to the second agent.

**Uniqueid Status Prefix** - If PREFIX option is selected above then this is the value of that prefix. Default is empty.

**Populate Lead In-Group** -If this option is ENABLED, then when a new lead is created when goinginto an In-Group, the security\_phrase or Show field will be populated with the Group ID of the In-Group. Default is ENABLED.

**QC Enabled** - Setting this field to Y allows for the agent Quality Control features to work. Default isN.

**QC Statuses** - This area allows the selection of which statuses of leads should be gone over by the QCsystem. Place a check next to the status that you want QC to review.

**QC WebForm** - The website address that a QC agent can go to when clicking on the WEBFORM link in the QC screen.

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

**QC Shift** - The shift timeframe used to pull QC records for an inbound\_group. The days of the weekare ignored for these functions.

**QC Get Record Launch** - Allows one of the following actions to be triggered upon a QC agentreceiving a new record.

**QC Show Recording** - This allows for a recording that may be linked with the QC record to be displayin the QC agent screen.

## INBOUND GROUP AGENT RANK, GRADE, AND CALL COUNT

At the bottom of the in-group modification screen there is a section that shows the ranks and grade of all agents for the in-group as well as the number of calls that each agent has taken in from that in-group for the day. This is also a form that allows you to modify the grade and rank for each agent, as well as if this In-Group is selected automatically for that agent.

### INBOUND GROUP REPORT

Available on top right hand corner of in-group modify page, under drop down menu of the gear icon. This report is identical to the inbound report available on the reports page.

### LOGGED IN AGENTS REPORT

Select the link “Click here to see agents logged in to this inbound group” to view a quick report of just that. This is the fastest method to view all the agents currently logged into an in-group.

### DIDS USING IN-GROUP

Shows a list of all DIDs that may direct calls to this particular in-group.

### Call Menus Using This In-Group

Shows a list of all Call Menus that may direct calls to this particular in-group.

### CAMPAIGNS USING THIS IN-GROUP

Shows a list of all Campaigns that have this as an “allowed ingroup”.

### DELETE IN-GROUP

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

1. ELISION DIALER INBOUND DIDS

Also in the Inbound section are the DID functions which give you control over adding, modifying and deleting inbound DIDs(DID means Direct Inward Dialing, also known as DDI, Direct Dial-In).

## ADD A NEW DID

You can get to the Add DID screen by clicking on the "ADD A NEW DID" link at the top of the IN - GROUPS section. When adding a new DID you must make sure that you set the DID extension and DID name or the submission will not be accepted. Also, please ensure that the DID extension you have chosen does not have any spaces or punctuation characters. Once you create a DID, you will not be able to change the DID extension unless you delete the DID and re- create it again with a different DID extension. You cannot have duplicate DIDs in the system, and DID extensions must be between 2 and 20 characters in length.

DIDs can be directed to:

* Extensions in any context in the dialplan
* A specific agent's user session
* Phones that are specified in the Elision Dialer interface
* Elision Dialer In-Groups
* Elision Dialer Call Menus
* Voicemail

## COPY A DID

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

## Modify DID

**DID Extension** - This is the number, extension or DID that will trigger this entry and that you willroute within the system using this function. There is a reserved “default” DID that you can use which is just the word -default- without the dashes, that will allows you to send any call that does not match any other existing patterns to the default DID.

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

**DID Carrier Description** -This is another description field for the DID, to be used to describe thecarrier of this DID. It is not used for any other purpose in the system.

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

**Admin User Group** - This is the administrative user group for this DID, it allows admin viewing ofthis DID to be restricted by user group. Default is --ALL-- which allows any admin user with user group DID permissions to view this DID entry.

**DID Route** - This the type of route that you set the DID to use. EXTEN will send calls to the extensionentered below, VOICEMAIL will send calls directly to the voicemail box entered below, AGENT will send calls to a Elision Dialer agent if they are logged in, PHONE will send the call to a phones entry selected below, IN \_GROUP will send calls directly to the specified inbound group. Default is EXTEN. CALLMENU will send the call to the defined Call Menu.

**Record Call -** This option allows you to set the calls coming into this DID to be recorded. Y willrecord the entire call, Y\_QUEUESTOP will record the call until the call is hungup or enters an in-group queue, N will not record the call. Default is N.

NOTE: Your Administrator must enable the “Mix Crontab Entry”

**Extension** - If EXTEN is selected as the DID Route, then this is the dialplan extension that calls will besent to. Default is 9998811112, no-service.

**Extension Context** - If EXTEN is selected as the DID Route, then this is the dialplan context that callswill be sent to. Default is default.

**Voicemail Box** - If VOICEMAIL is selected as the DID Route, then this is the voicemail box that calls will be sent to. Default is empty.

**Phone Extension** - If PHONE is selected as the DID Route, then this is the phone extension that callswill be sent to.

**Phone Server IP** - If PHONE is selected as the DID Route, then this is the server IP for the phoneextension that calls will be sent to.

**Call Menu -** If CALLMENU is selected as the DID Route, then this is the Call Menu that calls will besent to.

**User Agent** - If AGENT is selected as the DID Route, then this is the Elision Dialer Agent that calls will besent to. The agent must be logged in and must have selected an AGENTDIRECT in-group to be able to take these calls.

**User Unavailable Action** - If AGENT is selected as the DID Route, and the user is not logged in oravailable, then this is the route that the calls will take.

**User Route Settings In -Group** - If AGENT is selected as the DID Route, then this is the In-Groupthat will be used for the queue settings as the caller is waiting to be sent to the agent. Default is AGENTDIRECT.

**In-Group ID** - If IN\_GROUP is selected as the DID Route, then this is the In-Group that calls will besent to.

**In-Group Call Handle Method** - If IN\_GROUP is selected as the DID Route, then this is the callhandling method used for these calls. CID will add a new lead record with every call using the Caller ID as the phone number, CIDLOOKUP will attempt to lookup the phone number by the Caller ID in the entire system, CIDLOOKUPRL will attempt to lookup the phone number by the Caller ID in only one specified list, CIDLOOKUPRC will attempt to lookup the phone number by the Caller ID in all of the lists that belong to the specified campaign, CLOSER is specified for Elision Dialer Closer calls, ANI will add a new lead record with every call using the ANI as the phone number, ANILOOKUP will attempt to lookup the phone number by the ANI in the entire system, ANILOOKUPRL will attampt to lookup the phone number by the ANI in only one specified list, XDIGITID will prompt the caller for an X digit code before the call will be put into the queue, VIDPROMPT will prompt the caller for their ID number and will create a new lead record with the Caller ID as the phone number and the ID as the Vendor ID, VIDPROMPTLOOKUP will attempt to lookup the ID in the entire system, VIDPROMPTLOOKUPRL will attempt to lookup the vendor ID by the ID in only one specified list, VIDPROMPTLOOKUPRC will attempt to lookup the vendor ID by the ID in all of the lists that belong to the specified campaign. If a CIDLOOKUP method is used with ALT, it will search the alt\_phone field for the phone number if no matches are found for the main phone number. If a CIDLOOKUP method is used with ADDR3, it will search the address3 field for the phone number if no matches are found for the main phone number and optionally the alt\_phone field. Default is CID.

**In-Group Agent Search Method** - If IN \_GROUP is selected as the DID Route, then this is the agentsearch method to be used by the inbound group, LO is Load-Balanced-Overflow and will try to send the call to an agent on the local server before trying to send it to an agent on another server, LB is Load-Balanced and will try to send the call to the next agent no matter what server they are on, SO is Server-Only and will only try to send the calls to agents on the server that the call came in on. Default is LB.

**In-Group List ID** - If IN\_GROUP is selected as the DID Route, then this is the List ID that leads maybe searched through and that leads will be inserted into if necessary.

**In-Group Campaign ID** - If IN\_GROUP is selected as the DID Route, then this is the Campaign IDthat leads may be searched for in if the call handle method is CIDLOOKUPRC.

**In-Group Phone Code** - If IN\_GROUP is selected as the DID Route, then this is the Phone Code usedif a new lead is created.

**Clean CID Number** - This field allows you to specify a number of digits to restrict the incoming callerID number to by putting an R in front of the number of digits, for example to restrict to the right 10 digits you would enter in R10. You can also use this feature to remove only a leading digit or digits by putting an L in front of the specific digits that you want to remove, for example to remove a 1 as the first digit you would enter in L1. Default is empty. If more than one rule is specified make sure you separate them with a space and the R will run before the L.

**No-Agent In-Group Redirect** -This setting allows you to redirect calls on this DID if there are nologged-in agents set to take calls from a specific In-Group. If this field is set to Y or NO \_PAUSED and there are no agents logged in to take calls from the specific In-Group the calls will go to the No Agent In-Group Extension set below. The NO\_PAUSED option will only send the call to the defined Extension if there are only paused agents in the in-group. The READY\_ONLY option will send the call to the defined Extension if there are no agents waiting for calls right now in the in-group. Default is DISABLED. See the No Agent In-Group Extension setting below for more information.

**No-Agent In-Group ID** -For the No-Agent In-Group Redirect feature above to work properly, an in-Group must be selected from this menu. Default is blank.

**No-Agent In -Group Extension** -For the No-Agent In-Group Redirect feature above to work properly,an Extension must be set in this field. Default is 9998811112. Below you will see some examples of default extensions that you can use in the system to terminate calls to,

* 9998811112 - ANSWERED, This number is not in service
* 9993333333 - UNANSWERED, signal 1, unallocated number, immediate hangup
* 9998888888 - UNANSWERED, signal 17, busy signal, immediate hangup
* 9994444444 - UNANSWERED, signal 27, out of order, immediate hangup
* 9995555555 - UNANSWERED, ring for 120 seconds then hangup

**Max Queue In -Group Calls** -This setting allows you to redirect calls on this DID if the number ofcalls waiting in queue in a specific In-Group is above a set number. If this field is set to 0 this feature is disabled. Default is 0. See the Max Queue In-Group Extension setting below for more information.

**Max Queue In -Group ID** -For the Max Queue In-Group Calls feature above to work properly, an in-Group must be selected from this menu. Default is blank.

**Max Queue In-Group Extension** -For the Max Queue In-Group Calls feature above to work properly,an Extension must be set in this field. Default is 9998811112. Directly above, in the No-Agent In-Group Extension description, you will see some examples of default extensions that you can use in the system to terminate calls to.

**Pre-Filter Phone Group ID** -This option allows you to filter calls through a Filter Phone Group beforegoing through the standard filtering process below. If a match is found then the call is redirected to the Pre-Filter Phone Group DID as defined below. Default is blank for disabled.

**Pre- Filter Phone Group DID** -For the Pre-Filter Phone Group ID feature above to work properly, aDID Pattern must be set in this field. Default is blank for disabled. It is recommended that you confirm the DID you enter here is properly set in the system before assigning it.

**Filter Inbound Number** - This option if enabled allows you to filter calls coming into this DID andsend them to an alternative action if they match a phone number that is in the filter phone group or a URL response if you have configured one. Default is DISABLED. GROUP will search in a Filter Phone Group (see ~ Filter Phone Groups). URL will send a URL and will match if a 1 is sent back.

**Filter Phone Group ID** - If the Filter Inbound Number field is set to GROUP then this is the ID of theFilter Phone Group that will have its numbers searched looking for a match to the caller ID number of the incoming call.

**Filter URL** - If the Filter Inbound Number field is set to URL then this is the web address of a scriptthat will search a remote system and return a 1 for a match and a 0 for no match. Only two variables are available in the address if you use the VAR prefix like with webform addresses in campaigns, --A -- phone\_number--B-- and --A--did\_pattern--B-- can be used in the URL to indicate the caller ID of the caller and the DID that the customer called in on.

**Filter URL DID Redirect** -If the Filter Inbound Number field is set to URL then this setting allows theURL response to specify a system DID to redirect the call to insead of using the default action. If a 0 is returned then the default action is used. If anything other than a 0 is returned then the call will be redirected to the resulting URL response value.

**Filter DNC Campaign** -If the Filter Inbound Number field is set to DNC\_CAMPAIGN then this is thespecific campaign ID that the campaign DNC list belongs to.

**Filter Action** - If Filter Inbound Number is activated and a match is found then this is the action that isto be taken. This is the same as the Route that you select for a DID, and the settings below function just like they do for a standard routing.

**Filter Extension** – If the Filter Action is set to EXTEN, this field indicates the extension where callswill be routed. Default is 9998811112

**Filter Extension Context** - If the Filter Action is set to EXTEN, then this represents the dialplancontext that calls will be sent to (if & when this field is populated). Default is default.

**Filter Voicemail Box** - If the Filter Action is set to VOICEMAIL, this field indicates the voicemailbox where calls will be deposited.

**Filter Phone Extension** - If the Filter Action is set to PHONE, this field indicates the Phone Extension where the calls will be sent.

**Filter Server IP** - If the Filter Action is set to PHONE, this field indicates the Server IP for the PhoneExtension where the calls will be sent.

**Filter Call Menu** - If the Filter Action is set to CALLMENU, this field indicates the Call Menu wherethe calls will be routed.

**Filter User Agent** - If the Filter Action is set to AGENT, this field indicates the Used ID that willreceive the calls.

**Filter User Unavailable Action** - If the Filter Action is set to AGENT, but the User is not logged in oravailable, calls will route to this location.

**Filter User Route Settings In-Group** - If the Filter Action is set to AGENT, then this is the In-Groupthat will be used for the queue settings as the caller is waiting to be sent to the agent. Default is AGENTDIRECT.

**Filter In-Group ID** - If the Filter Action is set to INGROUP, this field indicates the Ingroup where thecalls will be routed.

**Filter In -Group Call Handle Method** - If the Filter Action is set to IN\_GROUP, then this is the callhandling method used for these calls. CID will add a new lead record with every call using the Caller ID as the phone number, CIDLOOKUP will attempt to lookup the phone number by the Caller ID in the entire system, CIDLOOKUPRL will attempt to lookup the phone number by the Caller ID in only one specified list, CIDLOOKUPRC will attempt to lookup the phone number by the Caller ID in all of the lists that belong to the specified campaign, CLOSER is specified for ELISION DIALER Closer calls, ANI will add a new lead record with every call using the ANI as the phone number, ANILOOKUP will attempt to lookup the phone number by the ANI in the entire system, ANILOOKUPRL will attempt to lookup the phone number by the ANI in only one specified list, XDIGITID will prompt the caller for an X digit code before the call will be put into the queue, VIDPROMPT will prompt the caller for their ID number and will create a new lead record with the Caller ID as the phone number and the ID as the Vendor ID, VIDPROMPTLOOKUP will attempt to lookup the ID in the entire system, VIDPROMPTLOOKUPRL will attempt to lookup the vendor ID by the ID in only one specified list, VIDPROMPTLOOKUPRC will attempt to lookup the vendor ID by the ID in all of the lists that belong to the specified campaign. Default is CID. If a CIDLOOKUP method is used with ALT, it will search the alt\_phone field for the phone number if no matches are found for the main phone number. If a CIDLOOKUP method is used with ADDR3, it will search the address3 field for the phone number if no matches are found for the main phone number and optionally the alt\_phone field.

**Filter In-Group Agent Search Method** - If the Filter Action is set to IN\_GROUP, then this is theagent search method to be used by the inbound group, LO is Load-Balanced-Overflow and will try to send the call to an agent on the local server before trying to send it to an agent on another server, LB is Load-Balanced and will try to send the call to the next agent no matter what server they are on, SO is Server-Only and will only try to send the calls to agents on the server that the call came in on. Default is LB.

**Filter In-Group List ID** - If the Filter Action is set to IN\_GROUP, then this is the List ID that leads may be searched through and that leads will be inserted into if necessary.

**Filter In-Group Campaign ID** - If the Filter Action is set to IN \_GROUP, then this is the CampaignID that leads may be searched for in if the call handle method is CIDLOOKUPRC.

**Filter In -Group Phone Code** - If the Filter Action is set to IN\_GROUP, then this is the Phone Codeused if a new lead is created.

**Custom 1 through 5** - These five fields can be used for various purposes, mostly relating to customprogramming and reports.

## TRAFFIC REPORT

Queries calls by day (or days) and for either 1 or several DIDs, to display both a “DID Summary” & “Hold, Call, & Drop” statistics. The “DID Summary” shows any & all of the selected DIDs individually, their name, Inbound route, and the number of calls taken. The “Hold, Call, & Drop” shows call totals for the indicated DIDs, broken down in 15 minute intervals. This report also generates a bar graph at the bottom, showing all 3 call criteria, in the same intervals.

## RECORDINGS AND CALLS

Queries a specific DID (for 1 or more days) and shows each inbound call handled. It displays the date, time, status, phone number, campaign, wait time, agents, list ID, lead ID, and hang up reason. If the DID, or campaign allows recordings, it will displays a link to those recordings; to either listen or download.

## DELETE DID

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

1. ELISION DIALER CALL MENUS

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

## Add a New Call Menu

You can get to the Add Call Menu screen by clicking on the "ADD A NEW CALL MENU" link in the INBOUND section. When adding a new Call Menu you must make sure that you set the Menu ID and Menu name or the submission will not be accepted. Also, please make sure that the Menu ID you have chosen does not have any spaces or punctuation characters other than letters, numbers, underscores “\_” or dashes “-”. Once you create a Call Menu you will not be able to change that Menu ID unless you delete the Call Menu and re-create it again with a different Menu ID. You cannot have duplicate Menu IDs in the system, and Menu IDs must be between 2 and 50 characters in length.

Call Menus can give options to send calls to:

* Extensions in any context in the dialplan (including Asterisk-based IVRs)
* Phones that are specified in the Elision Dialer interface
* Elision Dialer In-Groups
* Elision Dialer Call Menus
* Elision Dialer DIDs
* Any AGI script on the system
* Hangup after playing a message
* Or simply hangup the call

## COPY A CALL MENU

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

## MODIFY CALL MENU

**Menu ID** - This is the ID for this step of the call menu. This will also show up as the context that isused in the dialplan for this call menu.

**Menu Name -** This field is the descriptive name for the call menu.

**Admin User Group** - This is the administrative user group for this Call Menu, it allows admin viewingof this Call Menu to be restricted by user group. Default is --ALL-- which allows any admin user with user group Call Menu permissions to view this Call Menu entry.

**Menu Prompt -** This field contains the file name of the audio prompt to play at the beginning of thismenu. You can enter multiple prompts in this field and the other prompt fields by separating them with a pipe character. To prevent the caller from interrupting the message with a key press, place NOINT directly in front of the prompt filename (no spaces). It should not be part of the filename itself, but instead serves as a special flag for the system.

**Menu Timeout -** This field is where you set the timeout in seconds that the menu will wait for thecaller to enter in a DTMF choice. Setting this field to zero 0 will mean that there will be no wait time after the prompt is played.

**Menu Timeout Prompt -** This field contains the file name of the audio prompt to play when thetimeout has been reached. Default is NONE to play no audio at timeout.

**Menu Invalid Prompt -** This field contains the file name of the audio prompt to play when the callerhas selected an invalid option. Default is NONE to play no audio at invalid.

**Menu Repeat -** This field is where you define the number of times that the menu will play after thefirst time if no valid choice is made by the caller. Default is 1 to repeat the menu once.

**Menu Time Check -** This field is where you can select whether to restrict the Call Menu access to thespecific hours set up in the selected Call Time. If the Call Time is blank, this setting will be ignored. Default is 0 for disabled.

**Call Time -** This is the Call Time ID that will be used to restrict calling times if the Menu Time Checkoption is enabled.

**Track Calls in Real-Time Report -** This field is where you can select whether you want the call to betracked in the Real-time screen as an incoming IVR type call. Default is 1 for active.

**Tracking Group -** This is the ID that you can use to track calls to this Call Menu when looking at theIVR Report. The list includes CALLMENU as the default as well as all of the In-Groups.

**Log Key Press** – When enabled, this option will log the DTMF key press by the caller in this CallMenu. Default is 0 for disabled.

**Log Field -** If the Log Key Press option is enabled, this allows the responses to also be stored in the

indicated list field. *vendor\_lead\_code, source\_id, phone\_code, title, first\_name, middle\_initial,*

*last\_name, address1, address2, address3, city, state, province, postal\_code, country\_code, alt\_phone,*

*email, security\_phrase, comments, rank, owner, status, user.* Default is NONE for disabled.

**Option Value -** This field is where you define the menu option, possible choices are:0,1,2,3,4,5,6,7,8,9,\*,#,A,B,C,D,TIMECHECK, TIMEOUT, and INVALIDs. The special option TIMECHECK can be used only if you have Menu Time Check enabled and there is a Call Time defined for the Menu. The TIMEOUT option would be where the call is routed if the caller does not make an entry in the time allotted. INVALID will allow you to set what happens when the caller enters an invalid option. INVALID\_2ND and 3RD can only be active if INVALID is not used, it will wait until the second or third invalid entry by the caller before it executes the option. To delete an Option, just set the Route to REMOVE and the option will be deleted when you click the SUBMIT button.

**Option Description -** This field is where you can describe the option, this description will be put intothe dialplan as a comment above the option.

**Option Route -** This menu contains the options for where to send the call if this option is selected:CALLMENU,INGROUP,DID,HANGUP,EXTENSION,PHONE, & VOICEMAIL. For CALLMENU, the Route Value should be the Menu ID of the Call Menu that you want the call sent to. For INGROUP, the In-Group that you want the call to be sent to needs to be selected as well as the other 5 options that need to be set to properly route a call to an Inbound Group. For DID, the Route Value needs to be the DID pattern that you want to send the call to. For HANGUP, the Route Value can be the name of an audio file to play before hanging up the call. For EXTENSION, the Route Value needs to be the dialplan extension you want to send the call to, and the Route Value Context is the context that extension is located in, if left blank the context will default to default. For PHONE, the Route Value needs to be the phone login value for the phones entry that you want to send the call to. For VOICEMAIL, the Route Value needs to be the voicemail box number, the unavailable message will be played. For AGI, the Route Value needs to be the agi script and any values that need to be passed to it. NOTE: When Elision Dialer performs a lead lookup using the cm\_lookup.agi it also has the ability to update the Phone Number on the lead to the CID displayed on the incoming call.

**Option Route Value -** This field is where you enter the value that defines where in the selected OptionRoute that the call is to be directed to.

**Option Route Value Context -** This field is optional and only used for EXTENSION Option Routes.

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

**Call Menu qualify SQL option** - Allows filtering of campaign or in-group transferred calls. QualifySQL -</B> This field allows you to input SQL - Structured Query Language - database fragments, like with Filters, to determine whether this call menu should play for the caller or not. This feature only works if the call has the caller ID name set prior to being sent to this call menu, either as an outbound survey transfer, or through the use of a drop call menu for an In-Group call. If there is a match, the call will proceed as normal. If there is no match, the call will go to the D option or the invalid option if no D option is set. You cannot use single-quotes in this field, only double-quotes if they are needed. Default is empty for disabled.

1. ELISION DIALER FILTER PHONE GROUPS

Filter Phone Group Allows you to uniquely route incoming phone calls based entirely on the their caller ID. The Filter Phone Group is simply a group of phone numbers. If the DID has the “Filter Inbound Number” set to “GROUP”, it will look through all of the phone numbers in the indicated Filter Phone Group. If the incoming caller ID matches a number in the group, it routes the call to the specified filter location.

## ADD FILTER PHONE GROUP

To create a new filter group, click on the "ADD FILTER PHONE GROUP" link in the INBOUND section.

**Filter Phone Group ID** - This is the ID of the filter group, and should be between 2 and 20 charactersand have no punctuation except for underscore.

**Filter Phone Group Name** - This is the name of the Filter Phone Group and is displayed with the IDin select lists where this feature is used. This field should be between 2 and 40 characters.

**Filter Phone Group Description** - This is the description of the Filter Phone Group, it is purely fornotation purposes only and is not a required field.

**Admin User Group** - This is the administrative user group for this Filter Group, it allows adminviewing of this Filter Group to be restricted by user group. Default is --ALL-- which allows any admin user with user group Filter Group permissions to view this Filter Group entry. This should be changed to your own company name.

## ADD-DELETE FPG NUMBER

You can add & delete phone numbers from the Filter Phone Groups. The process is very similar, in practice, to adding & deleting numbers from the DNC List. Select the Filter Phone Group you wish to add the phone number to. Enter the phone number in the “Phone Numbers” field (one per line, no spaces or dashes), select “add” and click submit. If the number is already in the Filter Phone Group list you will see a duplicate message. The same process also works for removing phone numbers from the Filter Phone Group lists. To use this functionality you must have the proper permissions in the User settings.

The “Download Numbers In This List To A File” pulldown at the bottom allows you do export a complete list of Filter Phone Group numbers. Select the desired list in the pulldown, click submit, and it will export the complete list in .TXT format. We recommend opening this file with Excel, OpenOffice.org Calculator, other spreadsheet program for best viewing results.

1. ELISION DIALER USER GROUPS

User Groups are used for features like shift enforcement, agent screen display options, administrative report and campaign viewing permissions and a few other features.

When you click on the USER GROUPS link on the left side bar menu of the admin screen you will enter the User Groups section. This starts with a full listing of every Elision Dialer user group in the system with their group ID, name and a link to the user group modification page. We will first look at adding a new user group.

## ADD A NEW USER GROUP

You can get to the Add User Group screen by clicking on the "ADD USER GROUP" link at the top of the USER GROUP section. When adding a new user group you must make sure that you set the group and description or the submission will not be accepted. Also, please make sure that the group you have chosen does not have any spaces. You cannot have duplicate user groups in the system, and user group IDs must be between 2 and 20 characters in length.

## MODIFY USER GROUP

**User Group** - This is the short name of a Elision Dialer User group, try not to use any spaces or punctuationfor this field. max 20 characters, minimum of 2 characters.

**Description** - This is the description of the Elision Dialer user group max of 40 characters.

**Force Timeclock Login** - This option allows you to not let an agent log in to the Elision Dialer agentinterface if they have not logged into the timeclock. Default is N. There is an option to exempt admin users, levels 8 and 9.

**Shift Enforcement** - This setting allows you to restrict agent logins based upon the shifts that areselected below. OFF will not enforce shifts at all. START will only enforce the login time but will not affect an agent that is running over their shift time if they are already logged in. ALL will enforce shift start time and will log an agent out after they run over the end of their shift time. Default is OFF. There is an option to exempt admin users, levels 8 and 9.

**Allowed Campaigns -** This is a selectable list of Campaigns to which members of this user group canlog in to. The ALL-CAMPAIGNS option allows the users in this group to see and log in to any campaign on the system.

**Group Shifts** - This is a selectable list of shifts that can restrict the agents login time on the system.

**Agent Status Viewable Groups -** This is a selectable list of User Groups and user functions to whichmembers of this user group can view the status of as well as transfer calls to inside of the agent screen. The ALL-GROUPS option allows the users in this group to see and transfer calls to any user on the system. The CAMPAIGN-AGENTS option allows users in this group to see and transfer calls to any user in the campaign that they are logged into. The NOT-LOGGED-IN-AGENTS option allows all users in the system to be displayed, even if they are not logged-in currently.

**Agent Status View Time -** This option defines whether the agent will see the amount of time that usersin their agent sidebar have been in their current status. Default is N for no or disabled.

**Agent Call Log View -** This option defines whether the agent will be able to see their call log for callshandled through the Elision Dialer agent screen. This can be enabled in the User Group screen or the User screen in Administration. Default is N for no or disabled.

**Agent Transfer Options -** These options allow for the disabling of specific buttons in the TransferConference section of the Agent interface. Default is Y for yes or enabled.

**Agent Fullscreen -** This option if set to Y will set the height and width of the Elision Dialer agent screen tothe size of the web browser window without any allowance for the Agents View, Calls in Queue View or Calls in Session view. Default is N for no or disabled.

**Agent Allowed Chat Groups** -This is a selectable list of User Groups and user functions to whichmembers of this user group can view the status of as well as transfer calls to inside of the agent screen. The ALL-GROUPS option allows the users in this group to see and transfer calls to any user on initiate an internal chat to within the agent screen. The CAMPAIGN-AGENTS option allows users in this group to see and start chats with any user in the campaign that they are logged into.

**Allowed Reports -** If a user in this group is set to user level 7 or higher, then this feature can be used torestrict the reports that the users can view. Default is ALL. If you want to select more than one report then press the Ctrl key on your keyboard as you select the reports.

**Webphone URL Override -** This setting allows you to set an alternate webphone URL just for themembers of one user group. Default is empty.

**Webphone System Key Override -** This setting allows you to set an alternate webphone System Keyjust for the members of one user group. Default is empty.

**Webphone Dialpad Override -** This setting allows you to activate or deactivate the dialpad on thewebphone just for the members of one user group. Default is DISABLED. TOGGLE will allow the user to view and hide the dialpad by clicking a link.

**QC Allowed Campaigns** - A selectable list of Campaigns which members of this user group will beable to QC. The ALL-CAMPAIGNS option allows the users in this group to QC any campaign on the system.

**QC Allowed Inbound Groups** - A selectable list of Inbound Groups which members of this usergroup will be able to QC. The ALL-GROUPS option allows the users in this user group to QC any inbound group on the system.

**Allowed User Groups** - This is a selectable list of User Groups to which members of this user groupcan view and possibly edit. User Groups can restrict access to almost all aspects of the system, from inbound DIDs to phones to voicemail boxes. The --ALL-- option allows the users in this group to see and log in to any record on the system if their user permissions allow for it.

**Allowed Call Times** - This is a selectable list of Call Times to which members of this user group canuse in campaigns, in-groups and call menus. The --ALL-- option allows the users in this group to use all call times in the system.

**Users Within This User Group** – Displays the User ID, Full Name, User Level, and Active status ofall agents assigned to the User group.

**Add Or Remove In -Group Selected For Active Users In This User Group** - Allows you assign orremove an In-Group from an entire User Group in one action. Otherwise In-Groups are assigned 1 agent at a time, in either the User or the In-Group modification page.

## DELETE USER GROUP

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

1. GROUP HOURLY REPORT

You can get to the Group Hourly Report by clicking on the GROUP HOURLY link at the top of the USER GROUPS section. This will take you to the report screen where you need to select a user group, a disposition status you want a summary on, and the date and hour that you want those stats for. The results will appear in table form and will list the total calls taken by each agent in the group during that hour, the number of calls dispositioned with the status you defined in the form and how many calls of that status they dispositioned for the whole day. At the bottom of the table you will see totals for each of the tally columns as well as the form so that you can run another report if desired.

1. BULK GROUP CHANGE

If you need to change all of the members of one user group to another user group, you can use the Bulk Group Change page that is the last sub-menu option under the User Groups section.

There are two options on this page, change one user group to another, or change all non-ADMIN user group users to another user group.

1. ELISION DIALER SCHEDULED CALLBACKS

Scheduled CallBacks are leads that have been defined by an Agent to be contacted again at a specific date and time in the future. There are two types of Scheduled CallBacks: ANYONE callbacks which go back into the hopper for a campaign (after their callback date and time is reached) and USERONLY callbacks which are only able to be called by the agent that set the callback. Both types of callbacks can be modified by a manager if they have permissions to do so.

Callback records can be displayed in the Elision Dialer admin interface in many ways: by user, by campaign or by list. At the top right hand gear icon of the user, campaign and list modification screens you will see a link that will read "Click here to see all CallBack Holds for this user" or IN THIS CAMPAIGN or LIST depending on which screen you are in. If you click on this link you will see a list of the Scheduled Callbacks with the lead, list ID, campaign, date the customer was last called, date the callback is scheduled for, the User ID of the Agent that set the callback, whether the callback is ANYONE or USERONLY and what the status of the Scheduled Callback is. If an ANYONE Callback is LIVE it will be put back in the hopper and the status will be changed to CALLBK so that it can be called quickly. If an USERONLY callback is LIVE or ACTIVE it can be called by an agent when it is convenient for them by using their Scheduled Callbacks link on their Elision Dialer client screen.

If you want to edit a Scheduled Callback record, all you need to do is click on the lead ID in the list of Scheduled callbacks mentioned above. This will take you to the lead modification page where you can simply change the status of a lead to remove the callback record, or you can change it to an ANYONE callback if it is USERONLY, change the user ID associated with the Callback record if it is USERONLY or change the callback from ANYONE to USERONLY and specify a User ID to give it to. Note, you can only do this if you have permissions in your USER account to modify leads.

Administrators can also purge old callbacks by using the links at the bottom of the screen.

NOTE: An option can be added remove duplicate callback entries for a single lead, keeping the newest one only (contact Elision support for this paid feature).

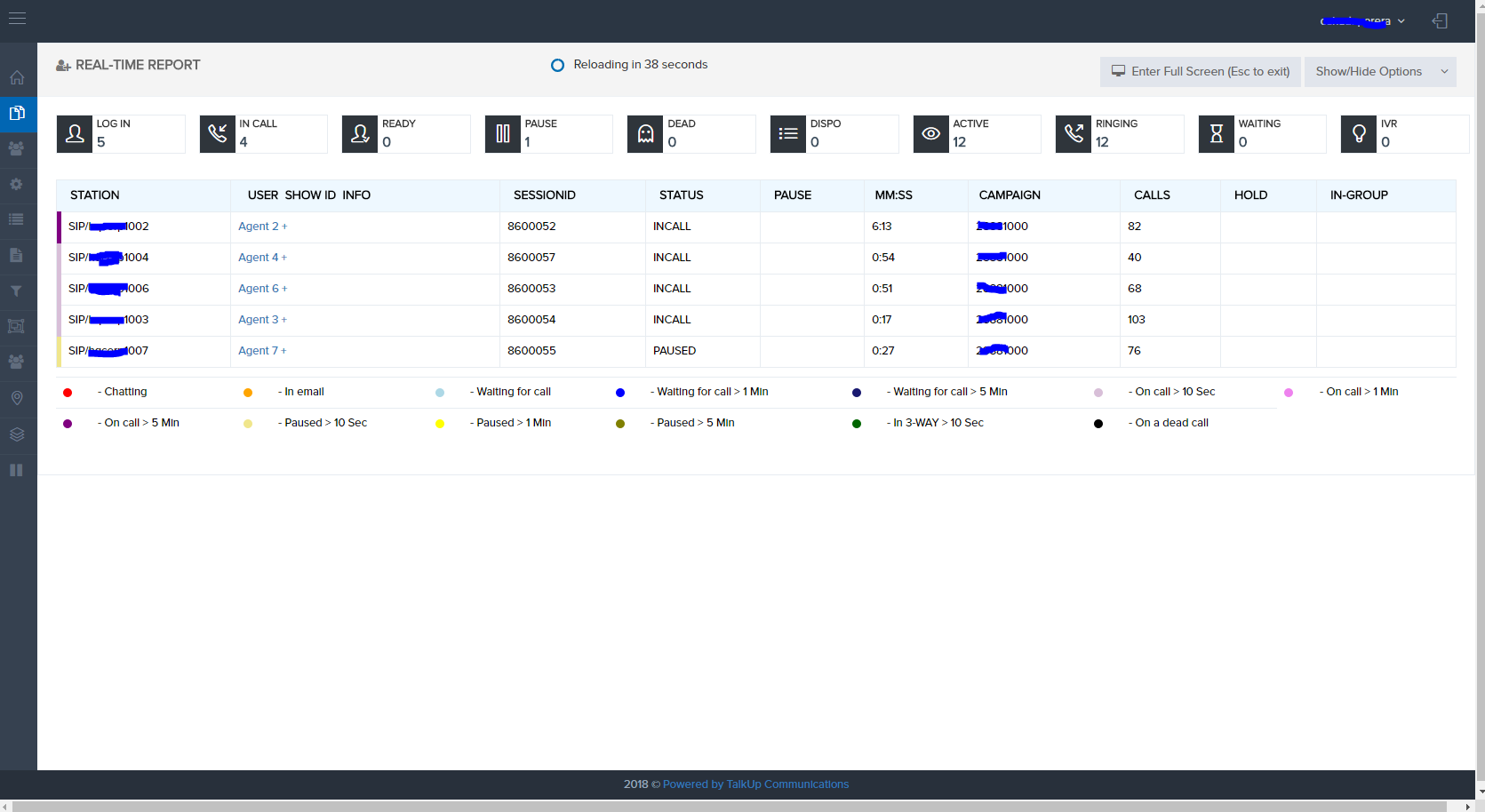
1. ELISION DIALER STATS AND REPORTS

You can get to the Stats and Reports page by clicking on the REPORTS link at the far left of the top of the section bar on the left side menu bar of the admin page. This page has links to many different summary and real-time reports that you can run on the activity of your Elision Dialer system.

## SYSTEM-WIDE REPORTS

Most of these reports also have an option to “Search archived data”. This is useful if you want to run a report on older than 90 days.

## REAL TIME MAIN REPORT - PER CAMPAIGN



**Figure 3 Real time Main Report**

This is also known as the “RealTime Report”, and is also linked to from the top of the campaign modification pages. This report refreshes every 40 seconds by default. The refresh rate can be modified from the “Choose Report Display Options” link at the top of the real-time screen. The report displays from the campaign (or campaigns) you are viewing: Dial level, statuses to be dialed, the order of the leads to be dialed, the lead filter if there is one, the hopper level for this campaign, the leads currently in the hopper for this campaign right now, the number of dialable leads in the entire database according to the criteria set for the campaign, the number of calls placed (or taken) for this campaign today, the number of dropped and answered calls in this campaign today, the drop percentage(out of answered calls) and the current time. Out of the TRUNK SHORT/FILL numbers, the SHORT(or first number) will show how many calls the dialer is unable to place because there are not enough lines available for the servers dialing on this campaign, and the FILL number will show how many lines on other dialers are being used to try to make up the shortfall.

Below these stats is a listing of the number of live calls(or calls being placed) for this campaign, the number of agents on calls, the number of agents waiting for calls and the number of agents that are currently paused in the campaign. The "calls waiting" and "agents waiting" numbers if higher than zero will turn red or blue respectively and get darker as their number goes up, being a very visible indicator of how the dialing for the campaign is going. Below these lines is the listing of agents logged- in, color coded their state: yellow is paused, blue is waiting for a call, white is on a call, purple is being on a call and black is the agent is still on the call screen but the customer has hung up. These colors also get darker the longer the agent is in a state.

If you click on the “Choose Report Display Options” link at the top of the page, a panel will open up with several options in it. One of the options is for inbound. If you select NO then no accounting for inbound calls will be taken for the numbers in the report, YES will include inbound calls for the in-groups allowed for the campaign into the report, and ONLY will only show inbound calls coming into allowable in-groups for the selected campaigns. If you have this set to ONLY, then you will notice that the stats at the top change and you will see items like average hold time and other inbound-only statistics. The “Select Campaigns” allows you to view just campaign in the real-time report, or by holding down “ctrl” and selecting several campaigns. When viewing multiple campaigns in the real-time report, keep in mind that the statistics displayed represent either combined totals or averages (depending on the stat). “Select User Groups” offers the same options, except sorted by User Group. Multiple groups can be selected using “ctrl”.

Other options include:

* Agent Time Stats displaying time clock information
* Running the "Dialable Lead Alert" shows which campaigns do not currently have lead loaded into the dial hopper
* "Show Ingroup Drop Row" displays the in-group on inbound calls, along with the total time the spent in queue.
* Another option is to see carrier hangup code statistics for calls that ended in the last several minutes and hours.

### REAL TIME MAIN REPORT – CHANGE IN-GROUPS

Ability to change the selected In-Groups for an agent immediately from the Real-Time report without requiring an agent to log out, you simply need to click on the plus sign “+” on the left side of the USER column for the user that you want to modify.

Now you can select one or more In-Groups that this agent will take calls from(you can select more than one by holding down the “Ctrl” key on your keyboard as you click on them).

The next field is where you can choose to Add, Remove or Change the In-groups you have selected from the in-groups that the agent has selected currently. Add will only add in-groups and not remove any from the ones currently selected for the agent, Remove will only delete in-groups from the ones selected for the agent. Change will replace whatever is currently selected for the agent with what you have selected in the “Selected in-Groups” select list.

Next is the Blended option. This will enable or disable automatic outbound dialing for this agent if it is available for the campaign.

The last option will allow you to set what you have selected as the default selected in-groups for the agent if this is set to YES.

To have full access to this feature, your user account must have the following settings set to “1”: View Reports, API Access, Change Agent Campaign, and Modify Users.

### REAL TIME MAIN REPORT – LIVE AUDIO MONITORING

Also available from the “Choose Report Display options” is the ability to live monitor or barge into agent calls. From the Monitor pulldown menu select either MONITOR, BARGE or WHISPER. In the phone field below, indicate the phone extension you will be listening from, and click “submit”. You will now be back at the Real Time report screen and each agent will have a “LISTEN” link to the right of their names. Click to LISTEN to the agent and it will ring your phone with a blind monitored session on the phone. See Tutorial 16 for an example of how to set this up and use it with a mobile cellphone.

### REAL TIME MAIN REPORT – ALL CAMPAIGNS SUMMARY

This report is basically the top summary section of the Real-time(Time-on-VDAD) report for all active campaigns on the system put into a single page without specific agent or specific call information. The name of each campaign in the report is also a link to go to its own Real-time Campaign report. There is also a Modify link that will go to the Campaign modification page for that campaign.

1. ELISION DIALER INBOUND REPORT

The Inbound Report has many of the same parts as the standard Outbound Calling report except it is only for inbound groups, not for outbound calling. At the top of the Inbound report you will see a breakdown of the basic call handling stats across the multiple in-groups that you have selected to run the report on. Another difference from the outbound report is that the Inbound Report also will show the Total and Average Queue time for calls, or how long the callers had to wait before they either hung up the phone or were sent to an agent.

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

The next different inbound section will show you the breakdown in seconds of the hold and drop calls as to how long they were holding before they were answered or dropped.

The call answered time and percent breakdown will show you number of calls and percentage of calls broken down across the same time frame as the previous section.

Below the Custom Status breakdown is a chart showing tallies of the initial queue position of all calls in the selected in-groups when they came into the in-group queue.

The last different inbound section is at the bottom and it is also using the same time breakdown as the sections which were just mentioned, except it is a breakdown in 15 minute increments of the answered time of calls in the selected in-groups.

This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND REPORT BY DID

Almost identical to the Inbound report. However this report displays the number of calls, and drops; along with the drop percentage and the number of calls received from an IVR (call menu). Below that, it further breaks down average call length, hold time, and the total transferred to an IVR. This shows various answered, dropped and queued data.

Call hold, drop, and answered time breakdowns show in the number of calls in the time interval each were handled (in seconds). This also shows answer percentages.

Next, is a breakdown of the calls by status (including custom statuses). Then there are call hangup reasons, with totals.

The call status stats show the status, its description, category, number of calls, total time, average time, and call per hour. The custom status category merely shows the custom status, description, and total calls.

Initial queue position displays a chart showing tallies of the initial queue position of all calls in the selected in-groups when they came into the in-group queue.

Agent stats shows a break down of each agent, their total calls, total call time, and average call time.

Below the agent stats, is a chart show the entire time agents were logged in, and the total calls taken along with drops, (separated in 15 minute intervals) during that time.

The last report is the Call answered breakdown, displaying how quickly calls were answered, by 15 minute intervals, throughout a 24 hour day. The answer time is divided in set increments of seconds, and shows the total calls answered inside of those criteria.

This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND/CLOSER SERVICE LEVEL REPORT

The inbound service level report is a report that has some of the information available in the standard inbound report, except it is in a different format. It also includes some new information.

This report can show you a breakdown per day of the basic call statistics for the selected in-group. You will also see much more information on hold times broken down across 15 minute increments in the two bottom sections of this report. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND SUMMARY HOURLY REPORT

The Inbound Summary Hourly Report gives you an hour-by- hour breakdown of the call activity of a selected group of in-groups that can be filtered by a call time scheme. At the top you will see a breakdown per in-group of standard statistics for inbound call handling. Below that is a breakdown per in-group and per hour of the same statistics shown above. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND DAILY REPORT

This report allows you to view 1 or several days worth of inbound information for a single campaign, and compare it against the week-to-date, month-to-date, and quarter-to-date statistics. This compares total calls offered, answered, and abandoned, as well as average abandon, answer speed, and talk time. This report also includes total talk, wrap, and call time. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND DID REPORT

The Inbound DID Report shows the statistics for calls passing through the Elision Dialer DID routing process. The first section of the report shows the breakdown per DID of how many calls came in during the specified date period. The next section is a day-by-day breakdown of the total calls for the selected DIDs. The last section is a 15-minute increment ASCII graph of the inbound call activity for those DIDs that shows when the calls came in during the day. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. INBOUND IVR/CALLMENU REPORT

The IVR/Call Menu Report will show you the path that calls took through your Elision Dialer Call Menus and optionally into further in-groups. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

The first set of statistics will show you the total number of calls that came into the Call Menus, the total that came in without any CallerID information, and the total of Unique CallerIDs that came in during the selected time period.

The next section is a breakdown(ranked by popularity) of all of the paths that callers took through your Call Menus and into in-groups. The first column shows the total calls that took each path. The second column shows the number of calls that went into an in-group. The third column shows how many of those queue calls dropped, followed by a percentage of that number. The fifth column shows the average amount of time the caller spent in the Call menu listening to prompts and the sixth column shows the average total time of the calls that used this Call Menu path. The last column is the actual path that the callers took through the Call Menus with each step separated by a slash “/”.

1. ELISION DIALER OUTBOUND SUMMARY INTERVAL REPORT

The Elision Dialer Outbound Interval Report gives you a different set of statistics than the general Outbound report, and it also can break down the statistics into 15 minute, 30 minute or 1 hour intervals to view. Also, the results can be filtered by a call time scheme so you can see your totals only for a specific time period during the day.

The first section is a basic totals overview for each selected campaign and a grand total with all selected campaigns. The System Release calls are calls that never make it to an agent, and are dispositioned by the system.

The next sections are a breakdown per campaign by the selected interval of the calling activity during each interval.

This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. ELISION DIALER OUTBOUND IVR REPORT

This report displays outbound IVR (Call Menu) & Queue statistics. The Outbound IVR work specifically with survey type campaigns. The report provides totals to calls taken, calls without caller ID, and total unique calls. The grid report breaks down your call totals based on the call path, or route the caller takes through the IVR. The report shows total calls, queue calls, drops, dropped percentage, average IVR time, and average total time, per call path. There is also en “Export” option for this report that will export call details related to Outbound IVR calls.

1. FRONTER – CLOSER REPORT

This report can be useful if you have Elision Dialer agents sending calls to other Elision Dialer agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report at the top will show the fronter statistics including the number of calls transferred, and out of those the number that became sales (Success%) as well as the other statuses that the calls ended up being dispositioned as. The bottom half of the report gives statistics on the Closer, or the agent that the call was sent to after the fronter. This section shows some additional information including the conversion percentage. Any disposition flagged as “Sales” is included in the sales statistics of this report.

1. FRONTER – CLOSER DETAIL REPORT

This report can be useful if you have Elision Dialer agents sending calls to other Elision Dialer agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report will show you a detailed accounting of every call that is sent from a fronter agent to a closer agent, what the lead ID of the call was and the time of the original call and the transfer time. You can also select to see a summary of this output included in the report.

1. LISTS PASS REPORT

This report does an in-depth analysis of several of the status flags from the first pass of the list through to the fifth pass, as well as the totals with all passes included. The total numbers as well as the rate for each pass are included. The status flags used are: CONTACTS, SALES, DNC, CUSTOMER CONTACT, UNWORKABLE, SCHEDULED CALLBACKS and COMPLETED.

1. LISTS CAMPAIGN STATUSES REPORT

This report provides Various List specific information. LIST ID SUMMARY shows the total leads per list. STATUS FLAG SUMMARY shows a breakdown, by Status Flag, for the specified leads. PER LIST DETAIL STATS displays the Status Flag Summary and the status totals for each individual list. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. CALLED COUNTS LIST IDS REPORT

This report will show a called count breakdown by status for a list or group of lists, optionally within a given date range. Lists may also be selected by campaign.

1. CAMPAIGN STATUS LIST REPORT

For the indicated campaign, this displays lead statuses broken down by list. This will also show total calls, duration, and handle time. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. EXPORT CALLS REPORT

This utility allows you to export call activity records and lead information from the database by selecting the date range, campaigns, in-groups, list Ids, user groups and statuses that you want to export. The file that is exported is in a tab-delimited text file format. The link to this report is only enabled if you have the Export Report user option set to 1. The fields that are exported are the following:

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

There are also additional options to export more fields using the EXTENDED options.

1. EXPORT LEADS REPORT

This is similar to the “EXPORT CALLS REPORT” in the information. However, rather than showing each individual call, it displays all the leads the calls were placed to. Each entry will only appear once, no matter how many times it was dialed during the reporting period. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. AGENT TIME DETAIL REPORT

The Agent Time Detail Report brings together all of the time-related metrics for an agent's activity into a single report. From Timeclock clocked-in time, to agent activity Pause, Wait, Talk, Dispo and Dead time, as well as all paused time broken down into it's pause codes in the section on the far right. This report can give you a better comparison tool of how an agent's time is being spent as compared to other agents. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

Here is an explanation of what each of the columns means on this report:

* TIME CLOCK = Time the agent been logged in to the time clock.
* AGENT TIME = Total time on the system (WAIT + TALK + DISPO + PAUSE).
* WAIT = Time the agent waits for a call.
* TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).
* DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).
* PAUSE = Time the agent is in pause mode (LOGIN + LAGGED + ...).
* DEAD = Time the agent is in a call after the customer has hung up.
* CUSTOMER = Time the agent is in a live call with a customer.
  + The next table is pause codes and their time.
* LOGIN = The pause code when going from login directly to pause.
* LAGGED = The time the agent had some network problem or similar.
* ANDIAL = This pause code triggers if the agent been on dispo screen for longer than 1000 seconds.
* and empty is undefined pause code.

1. AGENT STATUS DETAIL

The Agent Status Detail report is similar to the agent performance detail report, except it will not show you any time associated with the agent activity. However it will show you a field that can be very useful in outbound campaigns, DNC/CI%(Do Not Call take out of Contacts percentage). This is a good way to see what agents are setting many more leads to DNC as compared to other agents. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a DOWNLOAD link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns within this report mean:

* CALLS = Total number of calls sent to the user.
* CIcalls = Total number of call where there was a Human Answer which is set under Admin -> System Statuses.
* DNC/CI% = How much in percent DNC (Do Not Call) per Human Answers.

And the rest is just System Statuses that the agent picked and how many.

The Agent daily detail report is a report for only one user that can show what that user has dispositioned calls per day as across a range of dates. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a DOWNLOAD link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

1. AGENT PERFORMANCE DETAIL REPORT

The Agent Performance Detail Report is an accounting of an Agent's time for a pre-defined shift that they are logged into a campaign. Basically, this report is a combination of data from the Agent Time Detail and Agent Status Detail reports. In addition to a tally of statuses that each agent dispositioned, the Detail report shows Pause time, wait time and disposition time. Together with talk time this gives a full breakdown of all Agents' time on the campaign for that shift. Dead time is taken out of the talk time for an agent, since talk time is really counting the amount of time that the customer record is on the agent's screen, not the phone call connected time. To get that number you need to take the talk time and subtract the dead time from it. The AM shift is coded as 3:00 AM to 5:45 PM server time while the PM shift is from 5:45 PM to 11:59 PM. You can also select the entire day and narrow the results down by user group.

Also in the Performance Detail report is a section showing the break down of pause time for the agent when logged in to Elision Dialer . It is important to note that the total time in calls can be different from the total time an agent is logged in, the first section of this report will only show time associated with calls, not total time an agent is logged in like the second section shows.

This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

Here is an explanation of what the columns in this report mean:

* CALLS = Total number of calls sent to the user.
* TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).
* PAUSE = Amount of time being paused in related to call handling.
* AVG means Average so everything -AVG is for example amount of PAUSE-time divided by total number of calls: (PAUSE / CALLS = PAUSAVG) WAIT = Time the agent waits for a call.
* TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).
* DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).
* DEAD = Time the agent is in a call after the customer has hung up.
* CUSTOMER = Time the agent is in a live call with a customer.
* And the rest is just System Statuses that the agent picked and how many, to find out what they means
* then head over to Admin -> System Statuses.
  + Next table is Pause Codes.
* TOTAL = Total time on the system (WAIT + TALK + DISPO + PAUSE).
* NONPAUSE = Everything except pause (WAIT + TALK + DISPO).
* PAUSE = Only Pause.
* The last table is pause codes and their time (like Agent Time Detail). LOGIN = The pause code when going from login directly to pause. LAGGED = The time the agent had some network problem or similar.
* ANDIAL = This pause code triggers if the agent been on dispo screen for longer than 1000 seconds. and empty is undefined pause code.

NOTE: (The top section of this report has tatistics related to handling of calls only. What this means is that the top section will only include time involving a phone call. If an agent clicks to go active, then pauses, then goes active again without taking a call, that time will not be included in the top section of this report.)

1. TEAM PERFORMANCE DETAIL

Similar to the Agent Performance Detail Report, however this displays information for an entire User Group. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

This report contains some of the same information as the Agent Time Detail report, as well as several new fields. Also, the users are grouped together within their User Groups, and there is a User Group summary at the bottom of the results.

Here is an explanation of what the columns in this report mean:

* CALLS = Total number of calls sent to the user.
* LEADS = Total number of unique leads the user handled.
* CONTACTS = Total number of calls the user handled that were statused in a Customer Contact status.
* CONTACT RATIO = Percent of calls where a customer was contacted.
* NONPAUSE = Everything except pause (WAIT + TALK + DISPO).
* TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).
* TALK = Time the agent talks to a customer minus DEAD time.
* SALES = Total number of calls the user handled that were statused in a Sales status.
* SALES PER WORKING HOUR = Total number of sales divided by system time.
* SALES TO LEADS RATIO = Total number of sales divided by leads handled.
* SALES TO CONTACTS RATIO = Total number of sales divided by contacts.
* SALES PER HOUR = Total number of sales divided by talk time. INCOMPLETE SALES = Total number of calls statused as QCFAIL. CANCELLED SALES = Total number of calls statused as QCCANC. CALLBACKS = Total number of active or live callbacks for this user in the system. FIRST CALL RESOLUTION = Total number of calls handled divided by leads handled. AVERAGE SALE TIME = Total number of sales divided by the talk time for those sales calls. AVERAGE CONTACT TIME = Total number of contacts divided by the talk time for those contact calls.

1. PERFORMANCE COMPARISON REPORT

This report contains some of the same information as the Team Performance Detail report, and allows scrutiny of users in the statistics of calls, sales, sales conversion percentage (sales/calls), sales per hour, and displays that data for today, yesterday, and 2, 3, 5, 10, and 30 days prior. This report can be queried by campaign, user group, and user.

Here is an explanation of what the columns in this report mean:

* CALLS = Total number of calls sent to the user.
* SALES = Total number of calls the user handled that were statused in a Sales status.
* SALES CONVERSION PCT = Total number of sales divided by calls handled.
* SALES PER HOUR = Total number of sales divided by system time.
* TIME = Total time of these (PAUSE + WAIT + TALK + DISPO).

1. SINGLE AGENT DAILY DETAIL

This report contains most of the same information as the Agent Status Detail report, except the Agent daily detail report is a report for only one user that can show what that user has dispositioned calls per day as across a range of dates. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a DOWNLOAD link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns in this report mean:

* CALLS = Total number of calls sent to the user.
* CI CALLS = Total number of calls the user handled that were statused in a Customer Contact status.
* DNC CI PCT = Total number of DNC statused calls divided by the number of Customer Contact calls. (the rest of the fields are the statuses that the agent selected)

1. SINGLE AGENT DAILY TIME

This report is similar to the Agent Time Detail report, except for only one agent across a range of days. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a DOWNLOAD link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

Here is an explanation of what the columns in this report mean:

* PAUSE = Amount of time for the agent being paused.
* WAIT = Time the agent waits for a call.
* TALK = Time the agent talks to a customer or is in dead state (DEAD + CUSTOMER).
* DISPO = Time the agent uses at the disposition screen (where the agent picks NI, SALE etc).
* DEAD = Time the agent is in a call after the customer has hung up.
* CUSTOMER = Time the agent is in a live call with a customer.
* TOTAL = Total time of these (PAUSE + WAIT + TALK + DISPO).

1. USER GROUP LOGIN REPORT

This displays login data for each in a selected user group. It shows the user name, user ID, user group, first login date and time, along with the most recent login date & time, campaign, server IP address, computer IP address, phone extension, browser & version, phone login, server phone, and phone IP address.

Here is an explanation of what the columns in this report mean:

* FIRST LOGIN DATE = The earliest date this user logged in to the agent screen.
* LAST LOGIN DATE = The most recent date this user logged in to the agent screen.
* CAMPAIGN = The most recent campaign this user was logged in to.
* SERVER IP = The most recent server this user logged in to.
* COMPUTER IP = The most recent computer this user used to log in to the agent screen.
* EXTENSION = The most recent phone this user used to log in to the agent screen.
* BROWSER = The most recent web browser version this user used to log in to the agent screen.
* PHONE LOGIN = The most recent phone login this user used to log in to the agent screen.
* SERVER PHONE = The most recent server phone account this user was logged in through.
* PHONE IP = The IP address of the phone during the most recent agent screen session.

1. USER STATS

This page is a collection of the following reports: AGENT TALK TIME AND STATUS, AGENT LOGIN/LOGOUT TIME, TIMECLOCK LOGIN/LOGOUT TIME, CLOSER IN-GROUP SELECTION LOGS, OUTBOUND CALLS FOR THIS TIME PERIOD, INBOUND/CLOSER CALLS FOR THIS TIME PERIOD, AGENT ACTIVITY FOR THIS TIME PERIOD, RECORDINGS FOR THIS TIME PERIOD, MANUAL OUTBOUND CALLS FOR THIS TIME PERIOD, LEAD SEARCHES FOR THIS TIME PERIOD, PREVIEW LEAD SKIPS FOR THIS TIME PERIOD. They can be queried for one or a string of days. All reports on this page can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. USER TIMECLOCK REPORT

This report allows you to see time clock data for one user or many users grouped by user group. It is important to note that this report will only use data from time clock records that have been closed (records that contain a LOGOUT entry). You can sort this report by various fields and there will be a total at the bottom. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. USER GROUP TIMECLOCK STATUS REPORT

This is a current-day report that can show you by user group whether users are logged into the Timeclock and/or the Elision Dialer Agent interface. This is a good report to show a manager what agents need to log in or log out of the timeclock at the beginning or end of a shift.

1. USER TIMECLOCK DETAIL REPORT

This report is queried by User Group, and displays time clock information for each user in the indicated group. It displays their User Name, User ID, User Group, Time Clock (or total time clocked in), and each time clock punch. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

1. ADMIN CHANGES LOG

This set of reports allows you to look at all of the changes made by users of the Administration interface, which you can view by administrative section and record altered. You can also view the database query that was used to make the change and see the differences highlighted between the old version and the new.

1. GENERATING AUDIO PROMPTS THROUGH A PHONE

You have the ability to record audio prompts for Asterisk and Elision Dialer to use just by using the phone. To record a new prompt just dial 8168 on your phone connected to your Elision Dialer server. You will be prompted for an ID (which is 4321 followed by the pound key #). Once you are logged in, you will hear the recording instructions and after the beep you can start recording your message. When you are done recording you should press the pound(hash) key. You will then be presented with three options: press 1 to save the prompt, press 2 to listen to the prompt you just recorded or press 3 to re-record the prompt. Once you accept the recording, the filename of the recording will be played back to you. The system will start with 85100001 as the first ID and will increment by one every time you go to record a new file. Within Elision Dialer these recordings can be used in several fields including:

* The Answering Machine Message field in the Campaigns screen
* The Safe Harbor Exten field in the Campaigns screen
* The Drop Exten field in the In-Groups screen
* The after-hours message for In-Groups
* The agent alert message for In-Groups
* Several places in the Campaign Survey options

1. BLIND MONITORING ELISION DIALER AGENTS

One other function that can be used through a Elision Dialer -attached phone is to listen in on a Elision Dialer Agent and the customer they are talking to without them hearing that you are on the line monitoring them. To do this, simply dial 0 plus the session ID(for example: 0 + 8600051 so you would dial 08600051) of the Agent you wish to monitor. You can find the listing of Agents and their associated sessionIDs on the Real-time report (also known as "Time On VDAD") page. To finish, simply hangup the phone.

Another method of blind monitoring allows you to go from session to session on a single Elision Dialer server without hanging up in between. If you dial 8162 you will hear “extension” and you will be able to dial 8 + the last 3 digits of the agent's session ID to blind monitor the agent(i.e. 8051 for session 8600051). Then when you want to move to another session you press any digit on your phone and you will be brought back to the “extension” prompt. You can also barge in using this dial-in, but you would dial 99 + the last 3 digits of the agent's sessionID (i.e. 99051 for 8600051).

See also the web-based method of monitoring through the Real-Time Report mentioned above.

1. MANAGER BARGE-IN ON ELISION DIALER AGENT CALLS

It is even easier for a Manager to enter a conversation with an Agent and their Customer by simply dialing the Agent's session ID(for example 8600051) into their Elision Dialer -attached phone. Once the number is dialed, both parties will hear the entry tone(double tone) and the Manager can talk to and listen to both of the other parties on the call. To finish, simply hang up the phone.

1. 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. Elision Dialer filters many fields so that these characters are removed and can cause no harm to the system.

## WHY ARE THERE TWO AGENTS IN THE SAME SESSION TALKING TO EACH OTHER?

This usually happens when one of the agents does not log out properly or does not hang up their phone when they log out. When an agent is done and wants to log out, it is very important that they click on the LOGOUT link at the top of their agent screen.

## WHAT ARE ALL THESE SYSTEM STATUSES MEAN?

Here is a list of the default system statuses in Elision Dialer and what they mean:

NEW - New Lead - Lead has not been called, or cannot be called

QUEUE - Lead To Be Called - Lead is about to be sent to an agent

INCALL - Lead Being Called - Agent is talking to the lead

DROP - Agent Not Available - Call was dropped while customer was waiting for an agent

XDROP - Agent Not Available IN - Call was dropped while customer was waiting for an agent on an inbound call

NA - No Answer AutoDial - Any outbound call that does not receive an Answer signal(or other signal)

from the carrier. This can include ring-no-answer, disconnected, carrier congestion and other errors

CALLBK - Call Back - Callback, both scheduled and non-scheduled

CBHOLD - Call Back Hold - Scheduled ANYONE callback that has not hit it's trigger, or an AGENTONLY callback

A - Answering Machine - Agent- defined Answering Machine AA - Answering Machine Auto - Dialer-defined Answering Machine

AM - Answering Machine Sent to Mesg - AMD(Answering Machine Detection) call sent to a message to be played

AL - Answering Machine Msg Played - AMD(Answering Machine Detection) call sent to a message and message has been played

AMDXFR - Answering Machine Transfer to Call Menu or In-Group AFAX - Fax Machine Auto - Dialer-defined Fax Machine B - Busy - Agent-defined Busy signal

AB - Busy Auto - Carrier-received Busy signal

DC - Disconnected Number - Agent-Defined Disconnected number ADC - Disconnected Number Auto - Carrier-received Disconnected number ADCT - Congested Number Auto - Carrier-received Congestion(19,21,34,38) DEC - Declined Sale - Agent-defined status

DNC - DO NOT CALL - If defined, lead will also go in the ELISION DIALER DNC list DNCL - DO NOT CALL Hopper Match - status of a lead that matches the phone number of a lead that has been placed in the ELISION DIALER DNC list

DNCC - DO NOT CALL Hopper Match Campaign- status of a lead that matches the phone number of a lead that has been placed in the ELISION DIALER Campaign-specific DNC list for this Campaign SALE - Sale Made - Agent-defined status

N - No Answer - Agent-defined status

NI - Not Interested - Agent-defined status

NP - No Pitch No Price - Agent-defined status

PU - Call Picked Up - Status that a call is changed to as soon as the carrier has sent the Answer signal

and before the call is sent on to an agent

PM - Played Message - outbound broadcast or SURVEY campaign status for when a message has been played to the customer

XFER - Call Transferred - Call has been sent from an agent to a Closer agent ERI - Agent Error - An agent has closed their browser before dispositioning a lead

DONEM - Agent placed a manual dial phone call and then closed their browser before dispositioning a

lead

SVYEXT - Survey sent to Extension - Survey outbound campaign status only

SVYVM - Survey sent to Voicemail - Survey outbound campaign status only

SVYHU - Survey Hungup - Survey outbound campaign status only

SVYREC - Survey sent to Record - Survey outbound campaign status only

HXFER - Hold Recall Transfer to another in-group HOLDTO - Hold time option call termination on inbound call QVMAIL - Queue Abandon Voicemail Left RQXFER - Re-Queue Transfer back to agent

CPDATB - Sangoma Call Progress Detection CPD All-Trunks-Busy CPDB - Sangoma Call Progress Detection CPD Busy CPDNA - Sangoma Call Progress Detection CPD No-Answer

CPDREJ - Sangoma Call Progress Detection CPD Reject CPDINV - Sangoma Call Progress Detection CPD Invalid-Number CPDSUA - Sangoma Call Progress Detection CPD Service-Unavailable CPDSI - Sangoma Call Progress Detection CPD Sit-Intercept CPDSNC - Sangoma Call Progress Detection CPD Sit-No-Circuit CPDSR - Sangoma Call Progress Detection CPD Sit-Reorder CPDSUK - Sangoma Call Progress Detection CPD Sit-Unknown CPDSV - Sangoma Call Progress Detection CPD Sit-Vacant CPDUK - Sangoma Call Progress Detection CPD Unknown CPDERR - Sangoma Call Progress Detection CPD Error

TIMEOT - Inbound call Drop Timeout, call waited until drop-seconds and was sent on to the drop action

AFTHRS - Inbound after hours drop, call received outside of in-group call time NANQUE - Inbound no agent no queue drop, no agent logged in RAXFER - Remote Agent API transfer

ALTNUM - Agent manual Dial Alternate number dialing, number dialed before final disposition

DISPO - Agent in disposition screen when they closed their web browser wiithout selecting dispisition

WAITTO - Wait time option call termination on inbound call PDROP - Pre-routing dropped call, call hung up the instant the Answer signal is received IVRXFR - Outbound drop to Call Menu

SVYCLM - Survey sent to Call Menu - Survey outbound campaign status only MLINAT - Multi-Lead auto-alt-dial lead set to inactive

MAXCAL - Max Calls drop from in-group LRERR - Outbound Local Channel Resolution Error QCFAIL - QC\_FAIL\_CALLBK

QCCANC - QC cancel

QCPASS - QC passed

LSMERG - Agent lead search old lead merge

DISMX - Dispo Call Max Status

INBND - first status of a newly created lead going into the inbound queueing process

UNKXFR - CPD Unknown result Transfer to Call Menu or In-Group

UNKAM - CPD Unknown call sent to a message to be played

UNKAL - CPD Unknown call sent to a message and message has been played NVAINS - Default status for new inserted lead on phone NVA call

1. GLOSSARY

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

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

**API** - (application programming interface) These can be set up to automatically execute commands thatare 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 recipientanswers 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 routingchoices based on which button they presses. This is also know as an IVR (interactive voice response).

**Call times** - In Elision Dialer the outbound call time is relative to the local time zone of the lead beingcalled. 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 Elision Dialer , allowing for outbound calls. A user will need to log into acampaign to be able to place or receive phone calls.

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

**Chanunavailable** - this indicates calls the dialer intended to place, but didn't have enough linesavailable 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 Elision Dialer .

**CNAM** - (Caller ID Name) The name displayed on the recipient's caller ID. While the caller IDnumber 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 unableto place.

**CRM -** (Customer Relationship Management or Customer Resource Management) Any systemdesigned 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. Elision Dialer can integrate directly with any web-based CRM, using a URL string to post data.

**DID** - (Direct Inward Dialing) A phone number, provided by a carrier, so the dialer can receiveincoming 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 orhaving been placed on the National Do Not Call list.

**DNIS** - (Dialed Number Identification Service) a carrier service that indicates which, of the manypossible 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 amuch 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 Elision Dialer .

**Hotkeys** - A feature in Elision Dialer that allows the agent to disposition calls more quickly. It is enabled inthe 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 issometimes 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 beattached 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 pullingleads 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 featuresare: 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 beenpreloaded 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 thephone 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. Inthe example phone number “123-456-7890”, the telephone prefix would be “456”.

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

**Predictive dialing/adaptive dialing** - This uses an algorithm and administrator configured settings todynamically 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 isthen 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 Elision Dialer as a “survey campaign”.

**Ratio dialing** – Using this dial method, the dialer allocates a set number of lines per agent. The dialerthen 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 Elision Dialer , this is any user that is connected to the system by phone only,and does not have a computer. This was originally designed for users out in the field, that may only be connected over a mobile phone or hardline. The dialer can still send them calls, but they don't have any of the call control functions offered in the agent interface.

**Ring-all** - An ingroup setting that allows all of the agents' phones to ring, rather than sending the call tojust 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 recipientanswers 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-Harborregulations (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 number where the company can be reached back.

**SIP** - (Session Initiated Protocol) a specific VOIP protocol. Elision Dialer is capable of using either SIP orIAX2 protocols to send voice traffic.

**Status** - This is the system state of the lead. The system dynamically changes the status throughout anactive 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 theconnection with the carrier, but it can also include any other system that would send or receive calls with Elision Dialer .

**TTS** - (Text To Speech) Elision Dialer integrates with Cepstral Text To Speech, allowing written data to bespoken aloud over the phone.

**URL** - (Uniform Resource Locator) This is the specific character string displayed on top of a webbrowser, inside an address bar. This is usually designed to allow someone to access a resource of information on the internet or private network. Since Elision Dialer is web-based, it can also be used to dynamically post information and integrate with other web-based systems (CRM, billing program, shipping & receiving software, etc.).

**User vs Phone** - This can be confusing to new users of Elision Dialer . The phone (either softphone orhardware 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** - (Elision Dialer Auto-Dial) When this is listed as the “user” for a call, it means the system handled itand it was never sent to an agent.

**VOIP** - (Voice Over Internet Protocol) The delivery of voice communication over a network (usuallythe 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 thecase of Elision Dialer , the Web Form & Web Form 2 buttons can launch different URL scripts containing static or variable data for performing a multitude of tasks. Generally this is the most common way for agents to send data to another web-based system (CRM, billing program, shipping & receiving software, etc.).

