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SAMPLE

VICIdial®

MANAGER MANUAL

for ViciDial release 2.2.0

By Matt Florell

2010-03-23 version

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INTRODUCTION

This manual is meant as a resource for Call Center Managers and System Administrators to better understand how ViciDial works and to learn how to use all of it's features correctly as well as answer questions as to why things work the way they do within ViciDial and it's management interfaces. It is expected that you have thoroughly read through the ViciDial Agent manual before reading this manual. This manual is current as of the 2.2.0 release of ViciDial/astGUIclient.

What is ViciDial?

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

What is a ViciDial manager?

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

How do the manager administration screens work?

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

As of the writing of this manual(version 2.2.0), the ViciDial manager administration screens are available fully translated in English, Spanish, Italian, Greek, German and French.

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

What is new in version 2.2.0?

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

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

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

TUTORIALS

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

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

1. Go to http://server-address/vicidial/admin.php in your web browser, and login with your user/password (6666/1234).

2. Click on the MODIFY link for your account on the Users list screen: 6666

3. Change all of the admin interface options to "1" to enable them so that you can have access to all pages in the admin sections. Do NOT change the user level to 1, it has to stay at 9 for you to be able to have access to all administration functions.

4. It is strongly recommended that you change your user password as well while you are in this screen.

5. Be sure to click the SUBMIT button near the bottom of this screen so your changes will go into effect.

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

A. Add a new SIP or IAX phone to the system

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

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

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

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

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

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

5. Have the agent log into the vicidial.php script with the phone login(Login) of "201" and phone

password(Password) of "test".

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

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

B. Add a new Carrier trunk to your system

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

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

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

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

Carrier ID: NEWSIP
Carrier Name: ViciDial SIP carrier
Registration String: register => newsip:test@10.10.10.15:5060
<we will leave the Template ID field blank>
Account Entry: (see notes at the end of this tutorial for more information)

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

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

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

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

3. Click submit to create this Carrier record, wait for one minute and the carrier record should be active. In order to check whether the carrier account is registered or active you or your system administrator would need to log into the Asterisk CLI using a terminal program. To check registration simply type "sip show peers" or "iax2 show peers" to see the accounts that are set up on the system.

Account Entry Notes:
- "disallow=all" clears the preferred codecs list, you then specify the codecs you want to allow, in this instance we have chosen to only allow "ulaw"
- "type=friend" allows calls in from the carrier as well as out through the carrier
- "context=trunkinbound" this is context in the dialplan that will receive inbound calls from this carrier

- If you need to add E1/T1/PRI/POTS/FXO/FXS lines, you will first need a reliable telco connection card for your computer, we recommend Sangoma cards(http://www.sangoma.com), but Digium or Rhino will usually work as well. You will need to coordinate with your systems administrator to set up the zaptel/dahdi conf files properly as well as adding the dialplan entries to dial out these PSTN lines. There are sample zaptel.conf and zapata.conf files included with ViciDial for these kinds of connections(/docs/conf_examples/zaptel... and zapata...), as well as sample dialplan entries in the extensions.conf sample files:

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

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

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

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


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

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

1. Click on the CAMPAIGNS link at the top of the page to get to the CAMPAIGNS section and click on the ADD A NEW CAMPAIGN link

2. We will set the fields in the ADD A NEW CAMPAIGN form to the following values:
   Campaign ID: TESTCAMP
   Campaign Name: Test campaign for ViciDial
   Active: Y
   <we will leave park extension, park filename and web form blank for this tutorial>
   Allow Closers: Y
   Hopper Level: 5
   Dial Method: MANUAL
   Auto Dial Level: 0
   Next Agent Call: oldest call finish
   Local Call Time: 9am-9pm
   <we will also leave voicemail, script and get_call_launch blank for this tutorial, there is a detailed explanation of all fields in the VICIDIAL CAMPAIGNS section of this manual>

3. Click submit to create this new campaign

4. Now that the campaign TESTCAMP has been created, you can see the Detail View of the Campaign Modification screen with many more options that can be set for the campaign. We will leave everything in default settings and move on to load leads.

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

6. The format of this lead file is:

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

13. City
14. State - limited to 2 characters
15. Province
16. Postal Code
17. Country
18. Gender
19. Date of Birth
20. Alternate Phone Number
21. Email Address
22. Security Phrase
23. Comments
24. Rank
25. Owner

Here is an actual record from the test lead file packaged with the ViciDial release(test_ViciDial_lead_file.txt):

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

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

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

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

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

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

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

NOTE: If you are loading a large number of leads(tens of thousands or more in a single file), then using a duplicate check will significantly slow down the loading of your leads through the web-based lead loader. If you need to do a duplicate check on a large number of leads then you should consider using the Command-Line lead loader or setting up an FTP lead loader drop box.

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

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

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

14. Now click the BACK TO ADMIN link to get back to the administration screen, then click the LISTS link to go to the LISTS section

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

D. Change your outbound dialing campaign to use Predictive Dialing

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

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

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

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

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

5. Set the "Maximum Adapt Dial Level" to "3.0". This number can be higher or lower depending upon the number of agents and the available number of outside lines that you have on your ViciDial servers. For example, if you have a T1 with 24 channels on it and you have 6 agents that will be dialing on that server for this shift, you should set this field to "4.0" for most efficient possible dialing in Predictive mode.

6. Set the "Latest Server Time" to "2100" for a 9PM stop time in your call center. This field is only used if your Dial Method is set to ADAPT_TAPERED and it uses the anticipated time of your last calls to calculate how strictly it should apply the target drop percentage setting. You should set this to the time when you are going to stop calling for the day.

7. Leave the "Adapt Intensity Modifier" field set to "0". If you want the dialer to dial more aggressively then you can change this to a positive number. If you want the dialer to dial less aggressively then change this to a negative number.

8. Leave the "Dial Level Difference Target" field set to "0". If you want to try to maintain one free agent at all times, then you should set this field to "-1". If you want to always have one call in queue waiting for an agent, then you should set this field to "1". You will most likely have a higher drop rate if you set this field to a high positive number.

9. Now that you have changed your Campaign Detail settings to use predictive dialing, you should log in to the vicidial.php client application, wait for the phone to ring and click on the "RESUME" button to start the dialer.

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

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

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

SOME NOTES ABOUT PREDICTIVE DIALING:

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

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

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

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

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

3. Go to the IN-GROUPS section of the ViciDial admin website and click on the ADD A NEW IN-GROUP.

4. For this tutorial we will use the following values for the fields on the NEW IN-GROUP form:
    Group ID: SALESLINE
    Group Name: Primary Sales Line
    Group Color: red
    Active: Y
    Web Form: <we leave this blank> If you have a CRM, put its search page address here.
    Voicemail: <we leave this blank>
    Next Agent Call: oldest_call_finish
    Fronter Display: Y
    Script: NONE
    Get Call Launch: NONE

NOTE: the "web form" address can use custom variables just like the Script functionality can. To activate custom variables in the web form you just need to put "VAR" at the front of the URL, for example:
VARhttp://www.website.com/search.php?phone=--A--phone_number--B--

5. We will click submit to create the in-group, then we will see the expanded options of the in-group modification screen. In these fields we can define a call-time for the inbound group as well as what to do when the call comes in after hours. Here is also where we define music-on-hold and the periodic message to be played to the customer. For more information on these options, go to the in-groups section. For the purposes of this tutorial we will leave the default values in place.

6. The next step is to create the DID(Direct Inward Dialing, also known as DDI, Direct Dial-In) entry that will send the incoming call to the in-group that we just created. To get to the ADD A NEW DID ENTRY page you need to be in the IN-GROUPS section, then you can click on the ADD NEW DID link.

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

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

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

In-Group Call Handle Method:

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

In-Group Agent Search Method:

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

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

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

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

NOTES:

- You only need to have one CLOSER-type inbound campaign for multiple in-groups. Inbound/Closer capable inbound campaigns must have a dial level of at least 1 and a dial method of RATIO or INBOUND_MAN.

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

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

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

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

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

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

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

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

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

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

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

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

REGULATIONS FOR THE USA: FTC AND STATES

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

FTC REGULATIONS

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

FTC Federal Do-Not-Call List

The Federal Do-Not-Call list(DNC list), as of November 2007, has over 146,000,000 phone numbers in it. This is an opt-in list that is free for consumers and is maintained by the FTC. Companies who place outbound calls to solicit sales from consumers must filter their calling lists against the DNC list at least once a month. Penalties for calling customers on this list can result in thousands of dollars in fines for each violation and increased oversight from the FTC. To gain access to the list you need to register with the FTC as a Seller company. The full national DNC list with all area codes in it costs about $14,000 per year as of September, 2006. It is illegal to share a list with another seller company or offer filtering services to other companies. There are also some loopholes or ways around having to filter your lists against the DNC list:

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

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

FTC Safe Harbor Regulations

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

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

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

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

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

The fifth and final provision of Safe Harbor is that the company must maintain records of it's calling for up to 2 years and produce those records upon request. For ViciDial, these records are kept in the database indefinitely.

Other FTC Regulations

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

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

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

Included in the August 2008 TSR revisions were also provisions to go into effect in September of 2009 that would outlaw the use of automated dialing without calls going to an agent(including broadcast dialing, robo-calling and press-1 dialing) unless you have the expressed written permission from the person that you are calling. Also, in the time period before this rule goes into effect, there must be an opt-out option when placing these calls.

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

SPECIFIC USA STATE REGULATIONS

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

Local Calling Times

Several states have different allowable calling times during different days of the week and times of the day. For example, here is a listing of the state-specific call times that are built-in to ViciDial and can be activated:
- **Alabama**(AL) - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Indiana**(IN) - Calling only allowed from 9am-8pm Mon-Sun
- **Kentucky**(KY) - Calling only allowed from 10am-9pm Mon-Sun
- **Louisiana**(LA) - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Maine**(ME) - Calling only allowed from 9am-5pm Mon-Sun
- **Massachusetts**(MA) - Calling only allowed from 9am-8pm Mon-Sun
- **Mississippi**(MS) - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Nevada**(NV) - Calling only allowed from 9am-8pm Mon-Sun
- **Pennsylvania**(PN) - Calling only allowed from 9am-9pm Mon-Sat and 1:30pm-9pm on Sundays
- **Rhode Island**(RI) - Calling only allowed from 9am-6pm Mon-Fri, 10am-5pm Sat and none on Sun.
- **South Carolina**(SC) - Calling only allowed from 9am-7pm Mon-Sun
- **South Dakota**(SD) - No calling allowed on Sundays
- **Texas**(TX) - Calling only allowed from 9am-9pm Mon-Sat and 12pm-9pm on Sundays
- **Utah**(UT) - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Wyoming**(WY) - Calling only allowed from 9am-8pm Mon-Sun

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

Telemarketing Prohibited Holidays and Other Prohibitions

There are also several holidays where telemarketing is prohibited, they vary from state to state and can vary from year to year. Some examples of telemarketing-prohibited holidays are:
- **Martin Luter King Jr. Birthday** - January 16, Alabama/Louisiana/Rhode Island/Utah
- **President's Day** - February 20(3rd Monday in February), Alabama/Utah
- **Mardi Gras Day** - February 28 (can change every year), Alabama/Louisiana
- **Good Friday** - April 14 (changes every year), Louisiana
- **Confederate Memorial Day** - April 24(fourth Monday in April) , Alabama
- **Memorial Day** - May 29 (last Monday in May), Alabama/Louisiana/Rhode Island/Utah
- **Jefferson Davis' Birthday** - June 5, Alabama

- **Forth of July**- July 4, Alabama/Louisiana/Rhode Island/Utah and July 3 in Louisana
- **Pioneer Day** – July 24, Utah
- **Victory Day** - August 14, Rhode Island
- **Labor Day** – September 4 (first Monday in September), Alabama/Louisiana/Rhode Island/Utah
- **Columbus Day** – October 9 (second Monday in October), Alabama/Rhode Island/Utah
- **All Saints Day** - November 1, Louisana
- **Election Day** - November 7(always a Tuesday), Louisana/Rhode Island
- **Veterans Day** - November 10, Alabama/Louisana/Utah and November 11, Alabama/Rhode Island
- **Thanksgiving Day** – November 23 (fourth Thursday in November), Alabama/Louisiana/Rhode Island/Utah and the day after Thanksgiving, Louisiana
- **Christmas Day** – December 25, Alabama/Louisiana/Rhode Island/Utah

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

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

State-specific DNC lists

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

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

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

Recording of Conversations Regulations

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

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

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

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

REGULATIONS IN OTHER COUNTRIES: UK, CANADA AND OTHERS

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

UK Call Center Regulations

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

1. You must not attempt to contact a customer within 72 hours of an Abandon(or DROP) where you called the customer but had no agent for them to go to and they hung up the phone. The “Drop Lockout Time” field in the Campaign Detail screen was created for this purpose. If you need this feature enabled, just change this field to “72” and click SUBMIT on the Campaign Detail screen.

2. A company is permitted to calculate the drop rate across all campaigns in the company instead of per campaign like in the USA. The “Multiple Campaign Drop Rate Group” option in the Campaign Detail screen was created for this purpose. Simply set all of your campaigns to the same drop rate group and the drop rate will be calculated across all of them instead of individually. This will give you much more consistency in dial ratios across campaigns and will help you to better stay within the legal regulations.

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

Canada Call Center Regulations

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

1. Newspapers calling to solicit subscriptions are also exempt form the new regulations, just like only charities, surveys and politicians are in the USA.

2. Request-for-information contacts may be contacted for up to six months, whereas the limit is 3 months in the USA.

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

OVERVIEW OF ALL MANAGER SCREENS FUNCTIONS

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

VICIDIAL USERS

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

Adding a New User

You can get to the Add User screen by clicking on the "ADD A NEW USER" link at the top of the USERS section. As with most ViciDial add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new user you must make sure that you set the userID, full name, password and user group or the submission will not be accepted. Also, please make sure that the user ID you have chosen does not have any spaces or punctuation, only letters or numbers. Once you create a user you will not be able to change that userID unless you delete the user and re-create it again with a different userID. You cannot have duplicate UserIDs in the system, and UserIDs must be between 2 and 8 characters in length.

Modify User

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

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

Agent Interface Options

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

Admin Interface Options

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

Descriptions of ViciDial user fields

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

User ID - This field is where you put the ViciDial users ID number, can be up to 8 characters in length, Must be at least 2 characters in length with no spaces or punctuation of any kind. We recommend using only digits for the User ID, especially if you will want your agents to be able to use the dial-in feature.

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

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

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

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

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

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

Active - This field defines whether the user is active in the system and can use VICIDIAL resources. Default is Active. If the user is set to not active then they will not be shown in the initial display of the users when you go to the user list.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Allow Alerts - This field gives you the ability to allow agent browser alerts to be enabled by the agent for when calls come into their vicidial.php session. Default is 0 for NO.

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

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

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

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

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

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

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

Change Agent Campaign - This admin interface option, if set to 1, allows the user to alter the campaign that an agent is logged into while they are logged into it. Default is 0-not active.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

```
call_date,phone_number,status,user,full_name,campaign_id/in-group,vendor_lead_code,source_id,list_id,gmt_offset_now,phone_code,phone_number,title,first_name,middle_initial,last_name,address1,address2,address3,city,state,province,postal_code,country_code,gender,date_of_birth,alt_phone,email,security_phrase,comments,length_in_sec,user_group,alt_dial/queue_seconds, rank, owner
```

Delete From DNC Lists - This setting if set to 1 will allow a manager to remove phone numbers from the DNC lists in the VICIDIAL system.

Delete A User

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

Copy A User

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

Search For Users

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

More User Information

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

User Time Sheet

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

User Status

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

User Stats

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

User Multiple-Day Status Report

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

User Territories

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

User Callbacks

This report will show all of the active and live callbacks that an agent has set as well as some callback details including whether the callback is set as USERONLY or ANYONE. There is a link on this report for each callback record that allows a manager to alter any of the callback record settings if necessary.

Admin Changes for this User Record

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

VICIDIAL CAMPAIGNS

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

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

Add a New Campaign

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

Copy A Campaign

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

Modify Campaigns

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

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

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

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

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

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

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

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

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

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

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

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

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

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

VARhttp://--A--web_var--B--www.website.com/search.php?phone=--A--phone_number--B--

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

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

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

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

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

List Order - This menu is where you select how the leads that match the statuses selected above will be put in the lead hopper:
- DOWN: select the first leads loaded into the vicidial_list table
- UP: select the last leads loaded into the vicidial_list table
- UP PHONE: select the highest phone number and works its way down
- DOWN PHONE: select the lowest phone number and works its way up
- UP LAST NAME: starts with last names starting with Z and works its way down
- DOWN LAST NAME: starts with last names starting with A and works its way up
- UP COUNT: starts with most called leads and works its way down
- DOWN COUNT: starts with least called leads and works its way up
- DOWN COUNT 2nd NEW: starts with least called leads and works its way up inserting a NEW lead in every other lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 3nd NEW: starts with least called leads and works its way up inserting a NEW lead in every third lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 4th NEW: starts with least called leads and works its way up inserting a NEW lead in every forth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 5th NEW: starts with least called leads and works its way up inserting a NEW lead in every fifth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 6th NEW: starts with least called leads and works its way up inserting a NEW lead in every sixth lead. Must NOT have NEW selected in the dial statuses
- RANDOM: Randomly grabs lead within the statuses and lists defined
- UP LAST CALL TIME: Sorts by the newest local call time for the leads
- DOWN LAST CALL TIME: Sorts by the oldest local call time for the leads
- UP RANK: Starts with the highest rank and works its way down
- DOWN RANK: Starts with the lowest rank and works its way up
- UP OWNER: Starts with owners beginning with Z and works its way down
- DOWN OWNER: Starts with owners beginning with A and works its way up
- UP TIMEZONE: Starts with Eastern timezones and works West
- DOWN TIMEZONE: Starts with Western timezones and works East

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

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

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

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

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

Dial Method - This field is the way to define how dialing is to take place. If MANUAL then the auto_dial_level will be locked at 0 unless Dial Method is changed. If RATIO then the normal dialing a number of lines for Active agents. If INBOUND_MAN then the auto_dial_level should be locked at 1 and no outbound automated calls will be placed. This dial method allows for agentss to dial Manually through a list while still being able to receive inbound phone calls. ADAPT_HARD_LIMIT will dial predictively up to the dropped percentage and then not allow aggressive dialing once the drop limit is reached until the percentage goes down again. ADAPT_TAPERED allows for running over the dropped percentage in the first half of the shift(as defined by call_time selected for campaign) and gets more strict as the shift goes on. ADAPT_AVERAGE tries to maintain an average or the dropped percentage not imposing hard limits as aggressively as the other two methods. Only the Dialer can change the dial level when in predictive dialing mode. INBOUND_MAN allows the agent to place manual dial calls from a campaign list while being able to take inbound calls between manual dial calls.

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

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

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

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

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

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

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

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

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

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

Auto Alt-Number Dialing - This setting is used to automatically dial alternate number fields for a lead while dialing in the RATIO and ADAPT dial methods when there is no contact at the main phone number. To enable auto alt-number dialing you need to set this field to ALT_ONLY, ADDR3_ONLY or ALT_AND_ADDR3 and set your desired statuses in the Auto alt number dialing statuses section at the bottom of the Campaign Detail screen, usually the NA, B, DC and N statuses are what is used for this. This setting is not used by the MANUAL dial method. EXTENDED alternate numbers are numbers loaded into the system outside of the standard lead information screen. Using EXTENDED, you can have hundreds of phone numbers for a single customer record.

Next Agent Call - This determines which agent receives the next call that is available:
- random: orders by the random update value in the vicidial_live_agents table
- oldest_call_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
- oldest_call_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
- overall_user_level: orders by the user_level of the agent as defined in the vicidial_users table a higher user_level will receive more calls.
- campaign_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
- fewest_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- longest_wait_time: orders by the amount of time agent has been actively waiting for a call

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

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

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

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

Campaign CallerID - This field allows for the sending of a custom callerid number on the outbound calls. This is the number that would show up on the callerid of the person you are calling. The default is

0000000000. If you are using T1 or E1s to dial out this option is only available if you are using PRIs(ISDN T1s or E1s) that have the custom callerid feature turned on by your carrier, this will not work with Robbed-bit service(RBS) circuits. This will also work through most VOIP(SIP or IAX trunks) providers that allow dynamic outbound callerID. The custom callerID only applies to calls placed for the ViciDial campaign directly, any 3rd party calls or transfers will not send the custom callerID. NOTE: Sometimes putting UNKNOWN or PRIVATE in the field will yield the sending of your default callerID number by your carrier with the calls. You may want to test this and put 0000000000 in the callerid field instead if you do not want to send you CallerID. If your Asterisk server is running Asterisk@Home, Trixbox or FreePBX, you may have issues with sending a callerID properly, if you run into problems you should contact your system administrator. USA FTC regulations require the sending of a valid callerID number on outbound business to consumer calls.

Campaign VDAD extension - This field allows for a custom VDAD transfer extension. This allows you to use different call handling methods depending upon your campaign.
- 8364 – same as 8368
- 8365 – Will send the call only to an agent on the same server as the call is on
- 8366 – Used for press-1 and survey campaigns
- 8367 – Will try to first send the call to an agent on the local server, then it will look on other servers
- 8368 – DEFAULT – Will send the call to the next available agent no matter what server they are on
- 8369 – Used for Answering Machine Detection after that, same behavior as 8368
- 8373 – Used for Answering Machine Detection after that same behavior as 8366

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

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

Campaign Rec Filename - This field allows you to customize the name of the recording when Campaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN CUSTPHONE FULLDATE TINYDATE EPOCH AGENT. The default is FULLDATE_AGENT and would look like this 20051020-103108_6666. Another example is CAMPAIGN_TINYDATE_CUSTPHONE which would look like this TESTCAMP_51020103108_3125551212. 50 char max. It is best not to have any spaces or wild card characters in this field.

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

Campaign Script - This menu allows you to choose the script that will appear on the agents' screens for this campaign. Select NONE to show no script for this campaign. To see more information on the Script that has been selected just click on the linked "Script".

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

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

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

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

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

Quick Transfer Button - This option will add a Quick Transfer button to the agent screen below the Transfer-Conf button that will allow one click blind transferring of calls to the selected In-Group or number. IN_GROUP will send calls to the Default Xfer Group for this Campaign, or In-Group if there was an inbound call. The PRESET options will send the calls to the preset selected. Default is N for disabled.

PrePopulate Transfer Preset - This option will fill in the Number to Dial field in the Transfer Conference frame of the agent screen if defined. Default is N for disabled.

Timer Action - This feature allows you to trigger actions after a certain amount of time. the D1 through D5 DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE_ONLY will simply display the message that is in the field below. NONE will disable this feature and is the default.

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

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

CPD AMD Action - If you are using the Sangoma ParaXip Netborder Call Progress Detection software then you will want to enable this setting either setting it to DISPO which will disposition the call as (AA for Answering Machine or AFAX for Fax Machine) and hang it up if the call is being processed and has not been sent to an agent yet or MESSAGE which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED.

Agent Alt Num Dialing - This option allows an agent to manually dial the alternate phone number or address3 field after the main number has been called. This works in both manual dial and auto dial mode.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Agent Display Queue Count - If set to Y, when a customer is waiting for an agent, the Queue Calls display at the top of the agent screen will turn red and show the number of waiting calls. Default is Y.

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

No Hopper Dialing - If This is enabled, the hopper will not run for this campaign. This option is only available when the dial method is set to MANUAL or INBOUND_MAN. It is recommended that you do not enable this option if you have a very large lead database, over 100,000 leads. With No Hopper

Dialing, the following features do not work: lead recycling, auto-alt-dialing, list mix, list ordering with Xth NEW. If you want to use Owner Only Dialing you must have No Hopper Dialing enabled. Default is N for disabled.

Owner Only Dialing - If This is enabled, the agent will only receive leads that they are within the ownership parameters for. If this is set to USER then the agent must be the user defined in the database as the owner of this lead. If this is set to TERRITORY then the owner of the lead must match the territory listed in the User Modification screen for this agent. If this is set to USER_GROUP then the owner of the lead must match the user group that the agent is a member of. For this feature to work the dial method must be set to MANUAL or INBOUND_MAN and No Hopper Dialing must be enabled. Default is NONE for disabled.

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

Agent Display Queue Count - If set to Y, when a customer is waiting for an agent, the Queue Calls display at the top of the agent screen will turn red and show the number of waiting calls. Default is Y.

Agent View Calls in Queue - If set to anything but NONE, agents will be able to see details about the calls that are waiting in queue in their agent screen. If set to a number value, the calls displayed will be limited to the number selected. Default is NONE.

View Calls in Queue Launch - This setting if set to AUTO will have the Calls in Queue frame show up upon login by the agent into the agent screen. Default is MANUAL.

Agent Grab Calls in Queue - This option if set to Y will allow the agent to select the call that they want to take from the Calls in Queue display by clicking on it while paused. Agents will only be able to grab inbound calls or transferred calls, not outbound calls. Default is N.

Agent Call Re-Queue Button - This option if set to Y will add a Re-Queue Customer button to the agent screen, allowing the agent to send the call into an AGENTDIRECT queue that is reserved for the agent only. Default is N.

Agent Pause After Each Call - This option if set to Y will pause the agent after every call automatically. Default is N.

Manual Dial List ID - The default list_id to be used when an agent placces a manual call and a new lead record is created in vicidial_list. Default is 999. This field can contain digits only.

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

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

3-Way Call Outbound CallerID - This defines what is sent out as the outbound callerID number from 3-way calls placed by the agent, CAMPAIGN uses the custom campaign callerID, CUSTOMER uses the number of the customer that is active on the agents screen and AGENT_PHONE uses the callerID for the phone that the agent is logged into. AGENT_CHOOSE allows the agent to choose which callerID to use for 3-way calls from a list of choices.

3-Way Call Dial Prefix - This defines what is used as the dial prefix for 3-way calls, default is empty so the campaign dial prefix is used, passthru so you can hear ringing is 88.

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

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

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

Vtiger Search Category - If Vtiger integration is enabled in the system settings then this setting will define where the vtiger_search.php page will search for the phone number that was entered. There are 4 options that can be used in this field: LEAD- This option will search through the Vtiger leads only, ACCOUNT- This option will search through the Vtiger accounts and all contacts and sub-contacts for the phone number, VENDOR- This option will only search through the Vtiger vendors, ACCTID- This option works only for accounts and it will take the vicidial vendor_lead_code field and try to search for the Vtiger account ID. If unsuccessful it will try any other methods listed that you have selected. Multiple options can be used for each search, but on large databases this is not recommended. Default is LEAD. UNIFIED_CONTACT- This option will use the beta Vtiger 5.1.0 feature to search by phone number and bring up a search page in Vtiger.

Vtiger Search Dead Accounts - If Vtiger integration is enabled in the system settings then this setting will define whether deleted accounts will be searched when the agent clicks WEB FORM to search in the Vtiger system. DISABLED- deleted leads will not be searched, ASK- deleted leads will be searched and the vtiger search web page will ask the agent if they want to make the Vtiger account active, RESURRECT- will automatically make the deleted account active again and will take the agent to the account screen without delay upon clicking on WEB FORM. Default is DISABLED.

Vtiger Create Call Record - If Vtiger integration is enabled in the system settings then this setting will define whether a new Vtiger activity record is created for the call when the agent goes to the vtiger_search page. Default is Y.

Vtiger Create Lead Record - If Vtiger integration is enabled in the system settings and Vtiger Search Category includes LEAD then this setting will define whether a new Vtiger lead record is created when the agent goes to the vtiger_search page and no record is found to have the call phone number. Default is Y.

Vtiger Screen Login - If Vtiger integration is enabled in the system settings then this setting will define whether the user is logged into the Vtiger interface automatically when they login to VICIDIAL. Default is Y. The NEW_WINDOW option will open a new window upon login to the VICIDIAL agent screen.

Vtiger Status Call - If Vtiger integration is enabled in the system settings then this setting will define whether the status of the Vtiger Account will be updated with the status of the VICIDIAL call after it has been dispositioned. Default is N.

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

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

Start Call URL - This web URL address is not seen by the agent, but it is called every time a call is sent to an agent if it is populated. Uses the same variables as the web form fields and scripts. This URL can NOT be a relative path. The Start URL does not work for Manual dial calls. Default is blank.

Dispo Call URL - This web URL address is not seen by the agent, but it is called every time a call is dispositioned by an agent if it is populated. Uses the same variables as the web form fields and scripts. dispo and talk_time are the variables you can use to retrieve the agent-defined disposition for the call and the actual talk time in seconds of the call. This URL can NOT be a relative path. Default is blank.

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

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

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

Lists Within This Campaign

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

Dialable Leads and Leads in the Hopper

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

Campaign Ranks and Call Counts

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

Campaign-Specific Custom Statuses

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

Campaign Hotkeys

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

There are two special HotKey options that you can use in conjunction with Alternate Phone number dialing i it is enabled for a campaign, ALTPH2 - Alternate Phone Hot Dial and ADDR3-----Address3 Hot Dial allow an agent to use a hotkey to hangup their call, stay on the same lead, and dial another contact number from that lead.

Campaign Lead Recycling

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

Auto Alt-Number Dialing Statuses

If the Auto Alt-Number Dialing field is set to anything but NONE, then the leads that are dispositioned under these auto alt dial statuses will have their alt_phone and-or address3 fields dialed after any of these no-answer statuses are set. The Campaign Auto-Alt-Dial setting must be enabled for this to be active.

Agent Pause Codes

If the Agent Pause Codes Active field is set to active, then the agents will be able to select from these pause codes when they click on the PAUSE button on their screens. This data is then stored in the vicidial agent log. The Pause code must contain only letters and numbers and be less than 7 characters long. The pause code name can be no longer than 30 characters. You can see statistics on Agent pause code time in the Agent Performance Detail report.

Campaign Survey

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

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

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

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

Survey Not Interested Digit - This field is where you define the customer digit pressed that will show they are Not Interested.

Survey Not Interested Status - This field is where you select the status to be used for Not Interested. If DNC is used and the campaign is set to use DNC then the phone number will be automatically added to the VICIDIAL internal DNC list and possibly the campaign-specific DNC list.

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

Survey Not Interested Audio File - This is the audio filename that is played when the customer has opted-out of the survey, not opted-in or not responded if the no-response-action is set to OPTIN. After this audio file is played, the call will be hung up.

Survey Method - This option defines what happens to a call after the customer has opted-in. AGENT_XFER will send the call to the next available agent. VOICEMAIL will send the call to the voicemail box that is specified in the Voicemail field. EXTENSION will send the customer to the extension defined in the Survey Xfer Extension field. HANGUP will hang up the customer. CAMPREC_60_WAV will send the customer to have a recording made with their response, this recording will be placed in a folder named as the campaign inside of the Survey Campaign Recording Directory.

Survey No-Response Action - This is where you define what will happen if there is no response to the survey question. OPTIN will only send the call on to the Survey Method if the customer presses a dtmf digit. OPTOUT will send the customer on to the Survey Method even if they do not press a dtmf digit. If the customer does not press a digit and the No-Response action is set to OPTIN, they will be sent on to an agent after the timeout. If they do not pres a digit and the No-Response action is set to OPTOUT, then the customer will be hung up.

Survey Response Digit Map - This is the section where you can define a description to go with each dtmf digit option that the customer may select.

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

Survey Campaign Recording Directory - If the Survey Method of CAMPREC_60_WAV is selected then the customer response will be recorded and placed in a directory named after the campaign inside of this directory.

Survey Third Digit - This allows for a third call path if the Third digit as defined in this field is pressed by the customer.

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

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

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

Survey Third Extension - This is the third extension used for the call upon the selection by the customer of the Third Digit option. Default is 8300 which immediately hangs up the call after the Audio File message is played.

Campaign List Mix

Campaign List Mix is a feature that is not enabled by default, Your administrator needs to activate it on the server before you can use it. The basic idea behind List Mix is to be able to define the leads that you want to dial with a high degree of control. You can define a set of statuses in a single list to take a percentage of the leads to dial out of and then take another percentage of leads from another set of statuses in another list. You can then have the leads called in order of priority, mixed evenly or called randomly from the selected groups. The issues that come up with using List Mix are that you must have a clear idea of what leads you have available and keep on top of what you are dialing or you may run out of a specific groups of leads and you would be dialing leads that are not in the percentage mix that you wanted.

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

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

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

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

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

Logout All Agents From a Campaign

This link at the bottom of the page allows you to immediately logout all agents from the campaign without them knowing it and will stop all sending of calls to agents(until they login again). Use this feature with caution. This feature does not properly log their logout time and it for use only after a shift is supposed to have ended and agents have forgotten to log out, or if you must stop dialing on a campaign immediately.

Delete Campaign

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

Campaign Stats

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

Real-time Campaign Stats

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

Historical and Summary Campaign Reports

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

QUEUEMETRICS INTEGRATION

QueueMetrics is a proprietary statistical analysis program suite created by Loway Research to work with Asterisk-based call centers. ViciDial fully integrates with the QueueMetrics statistical analysis package through it's ability to log calls and agent activity to a queue_log table in a MySQL database. Functionality includes logging of inbound, outbound and manual dial phone calls, agent login, logout and pause codes, as well as the queue activity of phone calls and whether they entered the system through a DID or IVR. Also, through some additional configuration, the QueueMetrics live monitoring and recording retrieval can also work with ViciDial.

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

It is recommended that if you have a large call center(over 100 seats) and you want to use QueueMetrics, that you should install it on a separate dedicated machine. For more information about QueueMetrics, go to: http://www.queuemetrics.com/.

VTIGER INTEGRATION

Vtiger is a web-based Open-Source Customer Relationship Management(CRM) package. Depending on how your System Administrator has set up the integration on your server, ViciDial can integrate with Vtiger in the following ways:

- Export users and user groups from ViciDial to Vtiger
- Synchronize any user and user group changes made within ViciDial to the Vtiger user and group
- Bulk import Accounts into Vtiger, because the built-in Vtiger lead importer cannot handle large imports. This functionality must be done by a system Administrator
- Daily synchronization of Account details from Vtiger back into ViciDial
- Web Form lookup of Vtiger Accounts, Leads and Vendors from the ViciDial agent screen
- Reactivation of deleted Accounts in Vtiger from ViciDial web form search
- Ability to create new Account activity records upon opening the Vtiger Account from the ViciDial Web Form, or automatically after every agent call attempt
- ViciDial status synchronization after each call to set the siccode field in Vtiger to the last selected VICIDIAL status
- Click-to-Dial phone numbers from the Vtiger Account and Account List screens to put the phone number into the same ViciDial agent's screen to dial that phone number as a manual dial call

To configure ViciDial to work with Vtiger, look in the Admin → System Settings section of this manual and have your System Administrator read the VTIGER.txt document in the ViciDial installation docs directory. For Click-to-dial to function, you must have the API enabled on your system, and you must have created a user 1000 with API enabled. ViciDial integrates only with the 5.0.4 and 5.1.0 versions of Vtiger(5.1.0 is preferred). For more information on Vtiger, go to: http://www.vtiger.com/

SANGOMA CALL PROGRESS DETECTION(CPD) INTEGRATION

ViciDial is also integrated with the Sangoma/ParaXip CPD SIP gateway. This product is a proprietary Answering machine/Fax machine/Pre-Answer call progress detection engine that claims up to 95% accuracy in fast detection of humans and machines on calls.

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

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

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

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

CLOSING

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

FREQUENTLY ASKED QUESTIONS

Why can't my agents log in to the campaign until 9AM?

If there are no leads in the dial hopper for a campaign, then no agents are allowed to log in to the campaign. Since most campaigns in the USA will use the 9am-9pm call time definition, there will be no leads loaded with this definition for the campaign until it is 9:00:00 AM in the first time zone that you have leads for.

Why can't I use spaces, dashes or other special characters in some form fields?

This is for security and data integrity reasons. Putting certain combinations of special non letter or number characters in a login prompt for instance can corrupt or delete data in the system. ViciDial filters many fields so that these characters are removed and can cause no harm to the system.

Why are there two agents in the same session talking to each other?

This usually happens when one of the agents does not log out properly or does not hang up their phone when they log out. When an agent is done and wants to log out, it is very important that they click on the LOGOUT link at the top of their agent screen.