

VICIdial[®] **MANAGER MANUAL**

for VICIdial release 2.4

By Matt Florell

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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 2.4.0rc1 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 thousands of features and options available within VICIdial, and they are covered here in this manual.

What is a VICIdial manager?

A VICIdial manager is a person who adds, modifies or deletes users, campaigns, lists, inbound groups(or queues), DIDs, Call Menus(or IVRs), add voicemail boxes, configure phones and manage the music-on-hold and audio prompts in the system as well as other items within the VICIdial system. They also control the call pacing and other campaign settings while a campaign is running in the 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 2.4), the VICIdial manager administration screens are available fully translated in English, Spanish, Italian, Greek, German, French and Brazilian Portuguese.

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

What is new in version 2.4?

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(2.2.1):

- Changed "After hours", "No agent no queue", "drop timeout reached" DROPs to use AFTHRS/NANQUE/TIMEOT statuses

- Added an option to record calls that enter through a DID until they end or enter an in-group queue
- Added ability to have AGENTDIRECT calls that drop go to user's defined voicemail box
- Added ability to use a webphone added in an IFRAME in the agent screen.
- Added vdc_script_notes.php for call notes and appointment taking
- Added Call Log View options to the Agent screen allowing agents to see their past calls
- Added custom dialplan entries fields for System Settings and Servers
- Added ability to use security_phrase field in the VICIdial_list table as a Custom CallerID
- Changed voicemail auto-config to use voicemail.conf directly
- Changed AGENTDIRECT selection to be triggered by clicking on AGENTS link instead of number-to-dial field
- 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 transfers
- Added AGENTONLY Scheduled Callbacks display to show as red and/or blink in the agent interface
- Added carrier log display option to Real-time report to show the hangup causes for several time periods
- Added agc/deactivate_lead.php script that can change the status of a lead in another campaign after dispo
- Added options.php for VICIdial.php to preserve interface option changes through an upgrade
- Added CallCard featureset to allow for prepaid customer calling into an In-Group
- Added display options for agent screen Transfer-conf buttons in the User Group modification screen.
- Added ra_call_control API function to allow for hangup, transfer and dispo of calls sent to a Remote Agent
- Added Extension Groups feature to Remote Agents allowing calls to be sent round-robin to list of numbers
- Added agi-AGENT_route.agi script to more easily allow for agentdirect calls from call menus
- Added ability to search call logs from admin search lead page
- Added more login information to the User Stats page including session, server, phone and computer IP
- Added Manual Dial override option to campaigns to allow overriding of user manual dial options
- Added campaign option for alerting the agent when they are being blind monitored
- Added inbound custom call ID display and logging feature
- Added optional phone codecs definitions as well as system-wide defaults for codec definition
- Added option to allow user information to be blocked from the real-time report by user login
- Added Hold Time Option Minimum seconds option to in-groups
- Added headers to the list export and calls export reports
- Added several PRESS-1 options to the Hold Time Option settings for In-Groups
- Added Call Time after-hours filename override option used by inbound groups, useful for holidays
- Added inbound queue no dial setting that prevents outbound auto-dial if there are any inbound calls in queue
- Added In-group non-blocking options to allow newer calls through to agents while the prompts are playing
- Added utility in CallCard section to generate new card IDs and view by Run.

- Added Agent API functions for Send DTMF, Park Customer and the Transfer Conference functions as well
- Added prompt options for in-group VIDPROMPT methods when initiated from Call Menus
- Added web-configurable TTS voice option
- Added function for start_call_url to work with remote agents
- Added ability to rename custom default field names for fields in the agent interface
- Added new code to help deal with agents on poor network connections
- Added Custom List Fields to the Agent web interfaces, the ability to have custom forms with scripting
- Added options to agi-AGENT_route.agi to allow it to prompt for user IDs and check whether a user is logged in
- Added third generation web-based lead loader capable of loading more data types and custom list fields
- Added the ability to run selectable reports from a MySQL slave server
- Added options to include recording ID, Filename and/or Location with Call Export Report results
- Added Non-Agent API function for updating/deleting leads: update_lead
- Added Wait Time options to in-groups, based on customer wait time instead of estimated hold time
- Added second and third Hold and Wait Time options for PRESS_ options
- Added new timer actions allowing for transferring or hanging up of a call at a set time
- Added User Group setting for allowable reports to restrict report viewing
- Enabled User Group setting for allowable campaigns to restrict report viewing and admin.php use
- Added ability to search by callerid number when calls come into a DID and send matches to a different route
- Added ability to clean up callerid numbers when calls come into a DID
- Added ability to download DNC numbers from the internal and campaign-specific DNC lists
- Added In-Group setting which can delay the Calculation and announcement of Estimated Hold Time for X seconds
- Added Transfer Presets to Campaigns allowing many dial presets for agent interface transfer-conf frame
- Added ability on a per-campaign basis to hide the Number-to-Dial field in the transfer-conf frame
- Added Manual Dial Prefix to allow for a different dial path for manual dial agent interface calls
- Added DID variables for webforms and script variables in the agent screen
- Added password strength grading for users, phones and servers and ability to force admin user password change
- Added customer 3way hangup logging options to campaigns which logs if a customer hung up during a 3-way call
- Added ability to view Inbound Report by selected DIDs instead of by in-groups
- Added script which can be used in Dispo Call URL option to move a lead into a different list_id after dispo
- Added the Lists Campaign Statuses Report which is a list inventory report for lists in selected campaigns
- Added use of Custom List Fields in Web Forms, Scripts and Dispo Call URL entries used by the agent interface
- Added Add-Lead-URL feature to in-groups, its like Dispo Call URL except sends a web GET when lead is created
- Changed the PARK CUSTOMER option in campaigns to use a Music-on-Hold context instead of a filename and exten
- Added new IVR PARK CUSTOMER feature to campaigns allowing an agent to park a customer to an AGI script
- Added In-Group options for Estimated Hold Time Minimum, which can replace the "15 seconds" default
- Added a campaign option for Manual Preview Dial, to enable or disable the preview and skip options
- Added two new recording filename variable options: VENDORLEADCODE, LEADID
- Added the VICIdial Web Dial Firefox plugin, that allows right-click selection dialing of numbers on web pages

- Added ability to change users' in-group settings from the in-group modification screen in bulk
- Added Agent Average time stats option to the real-time screen
- Added customer park time counter to the agent screen when customer parked, and added logging of parked calls
- Added ADDMEMBER queue_log logging option to System Settings, and added CALLERONHOLD entries to queue_log
- Added admin no-cache and auto-refresh of modify screens to admin interface
- Added option for cross-server phone dialplan extensions in System Settings
- Added campaign feature to automatically adjust the hopper level to the dialing rate and the number of agents
- Added the ability to filter manual dial calls to adhere to the call time scheme selected for the campaign
- Added the ability to queue multiple manual dial calls for a specific logged-in agent using the Agent API
- Added ability to modify scheduled callback dates and comments in the Admin Modify Lead screen
- Added List override options for webform fields
- Added script to purge all VICIdial_callbacks records that are inactive or are tied to deleted leads
- Added did_log_export and recording_lookup functions to the non-agent API
- Added option to display statuses within the active lists of a campaign in the campaign modification screen
- Added rewritten AJAX/Javascript driven real-time report, able to support webphones.
- Added ability to hide fields in the agent interface by putting ---HIDE--- into the label option for a field
- Added preprocess leads in script to filter leads and generate standard format lead files
- Added the ability to have call times go beyond midnight for inbound calls.
- Added capability for agent interface to have webphone as a thin top bar
- Added hopper loader randomization option which allows for the leads to be randomized into the hopper
- Added add_user and add_phone non-agent API functions
- Changed VICIdial.php HTML formatting to be XHTML compliant
- Added vdc_script_dispo_example.php script which can be customized to require specific fields be filled in
- Added custom statuses for scheduled callbacks configurable with the Scheduled Callbacks flag
- Added Secondary List Order which allows for further sorting of leads into the hopper
- Added Default Campaign setting for the My Callback agent interface option
- Added the campaign option for per-call call notes in the agent interface
- Added the add-a-new-lead link to the admin interface
- Added ability for an agent to search for a lead in the agent interface while paused
- Added options to restrict agent lead search to the owner field equal to the user, user group, territories
- Added option for phone load balanced logins server twin checking on systems that have servers in pairs
- Changed scheduled callbacks display in the agent interface to show all callback and lead information
- Added on-hook agent phone feature allowing inbound calls from customers to ring on an on-hook agent phone
- Added ring_all Next Agent Call option for in-groups. This works with on-hook agent phones
- Added DEFER options to the Scheduled Callbacks Alert campaign feature allowing you to stop the blinking
- Added add_list and update_list functions to the Non-Agent API
- Added Campaign option to auto-pause agents when they go into several pre-call functions
- Changed almost all of the agent interface browser alerts to HTML alerts

- Added recording of Remote Agents calls per recording settings in campaigns
- Added MULTI_LEAD option for Auto-Alt-Dialing using a separate lead for each number linked by vendor_lead_code
- Added option to use the owner field to define a time zone abbreviation code in web/api/cli lead loaders
- Added ability to use external_dial Agent API function with a defined lead_id and optional alt_dial setting
- Added feature to show alert on manual dial if areacode and the zipcode are in different time zones
- Added utility to synchronize users, remote agents, dids, call menus, in-groups and campaigns with QM
- Added Custom 3-Way Button Transfer feature which allows for 3-way calls to be placed with several steps
- Added the phone_only.php script allows full webphone usage without needing to login as an agent
- Added option to Lists to allow you to choose the method of time zone adjustment that happens nightly
- Added Available Only Tally Threshold campaign option
- Added Auto Dial Level Threshold campaign option
- Changed Dial Level Difference Target to work properly with all RATIO and ADAPT dial method outbound campaigns
- Added ability to have outbound auto-dial campaigns drop to an audio prompt or a call menu
- Added new agent interface alert where manual dial calls will not be allowed if dispo process is not done
- Added Callback Days Limit campaign option to allow scheduled callbacks to be scheduled only X days from today
- Added ability to disable the Disposition screen on the agent interface
- Added install.pl options to define conf file and copy web language translation files
- Added Export Leads Report, like Export Calls Report, but lead is only exported once with the current status
- Added Agent Screen Labels allowing for each campaign to use a different set of labels on the agent screen
- Added ability to define the agent screen status fields shown to the agent: Call ID, Lead ID and List ID
- Added HIDDEN, READONLY and HIDEBLOB field types for custom list fields
- Added Outbound Campaign Test Call feature to allow you to place a call from the Campaign Detail screen
- Added ability to check for USA and Canada valid prefix and areacodes when web/cli/api lead loading
- Added ability to use AGENTEXT in AGENTDIRECT in-groups as a way to send dropped calls to an exten
- Added last_inbound_call_time and last_inbound_call_finish Next Agent Call routing options to in-groups
- Added CSV download option to almost all reports
- Added manual dial agent skip lead logging to the user stats page
- Added options to set the voicemail zone and extra voicemail options for each voicemail box
- Added ability to chose the type of callerid sent for inbound ring-agent calls in the in-group
- Added No-Agent Call URL feature to campaigns and in-groups
- Changed MULTI_LEAD Auto-Alt-Dial to use the Auto-Alt-Dial Statuses as set in the campaign automatically
- Added new Team Performance Detail report, a fairly detailed report that summarizes by user-group
- Added ability to use static audio from dynamic fields in Survey/Answering machine messages when using Cepstral
- Added the Campaign Status List Report which shows stats by status within each list_id for a campaign
- Added update_phone, add_phone_alias, update_phone_alias functions to the Non-Agent API
- Added optional DID Agent logging as System Settings option, logs calls that come into DIDs in a separate table
- Added options in Call Menus to allow for invalid action on second or third invalid selection
- Added ability to set custom callerID numbers per campaign for outbound calls by areacode

- Added Agent API function logout to log an agent out of their session
- Added Phone Login Load Balancing Grouping settings for better small campaign performance on large systems
- Added DID remote agent extension override entries, for inbound calls that are routed to remote agents
- Added 9 new User permissions to allow access to specific Admin sections like Vociemail Music-on-hold, etc...
- Added ability to define a callerid to use for action transfers from in-groups when transferring out
- Added ability to drop or after-hours to a call menu in in-groups.
- Added ability to set scheduled callbacks through the non-agent-api in the add_lead and update_lead functions
- Added new cm_lookup.agi script to allow for account lookups within a Call Menu
- Added new Call Count Limit option to the campaign screen, allows you to limit the number of attempts per lead
- Added new Complete flag for statuses and campaign statuses. Used by the new list stats columns
- Added Dialable and Penetration columns to the Statuses Within This List/Campaign tables on those screens
- Added Admin -> Contacts section(enabled in System Settings) which allows for system-wide transfer contacts
- Added Scheduled Callback Hours Block, to block callbacks from being displayed within X hours of being set
- Added "Admin User Group" setting to just about every section of the admin web interface and reports
- Added Max Calls settings to in-groups, allowing for a cap on concurrent calls being handled by each in-group
- Added ability to block customer information and hide portions of customer phone numbers in the admin interface
- Added ability to set scheduled callbacks with Agent API.
- Added alt_phone and address3 field searches to DID and Call Menu in-group call routing
- Added new Inbound Daily Report
- Added new Grade-Random Next-Agent-Call methods that allow for agents to change probability of receiving next call
- Added ability to update phone number on a lead when call is looked up through cm_lookup.agi script in Call Menu
- Added Daily Max Stats used for measuring the total-calls/max-agents for the day for in-groups and campaigns
- Added Timer Action for Dx_DIAL_QUIET options and timer_rebeep.agi script to allow for periodic beep
- Added Dialer Inventory Report, requires a process to be added to the crontab after-hours
- Separated the auto-generated dialplan into different contexts for easier segmentation of permissions
- Added Remote-Agent daily stats to the remote agent modification screen that shows total/maximum calls per day
- Added 'Hopper VLC Dup Check' campaign option that will check for duplicates by vendor_lead_code
- Added Dialer Inventory Report options for excluding lists and ranking shifts display order
- Added User Group multi-selection option to the real-time report
- Added HTML bar chart display options to most of the reports
- Added script that allows starting and stopping of new recordings on demand within a script in a IFRAME
- Added compatibility for DAHDI channelbank phones for agents in vicidial.php
- Added Carrier Log and Hangup Reason reports to Admin Utilities screen
- Added Lead Loading File Templates
- Added "--daily" option to the ADMIN_archive_log_tables.pl script
- Changed the AST_flush_DBqueue.pl script to only need to run on one server
- Added Danish agent web interface translation

TUTORIALS

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

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

1. Go to <http://server-address/vicidial/admin.php> in your web browser, and login with your user/password (6666/1234).
2. Click on the MODIFY link for your account on the Users list screen: 6666
3. Change all of the Admin Interface Options to "1" to enable them so that you can have access to all pages in the admin sections. Do NOT change the user level to 1, it has to stay at 9 for you to be able to have access to all administration functions.
4. It is strongly recommended that you change your user password as well while you are in this screen.
5. Be sure to click the SUBMIT button near the bottom of this screen so your changes will go into effect.

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

A. Initial Welcome Screen and Dialer Setup

VICIdial
ADMINISTRATION

HOME | Timeclock | Logout (6666) Tuesday April 24, 2012 14:02:41 PM

Reports

Welcome to VICIdial: copyright, trademark and license page

Copyright:	The VICIdial Call Center Suite is maintained by the VICIdial Group , © 2012
Trademark:	"VICIDIAL" is a registered trademark of the VICIdial Group . Here is our trademark use policy
License:	The VICIdial Call Center Suite is released under the AGPLv2 open source license
Source Code:	The VICIdial Call Center Suite software is available for download, and for use, free of cost. You can download the easy to install VICiBox CD ISO version , or only the source code

[Continue on to the Initial Setup](#)

VERSION: 2.4-364a
BUILD: 120409-1136
© 2012 VICIdial Group

Figure 1. Initial Dialer Setup and Welcome Screen

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

Login: 6666

Password: 1234

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

ViciDial ADMINISTRATION
 HOME | Timeclock | Logout (6666) Tuesday April 24, 2012 14:38 PM

Reports

Welcome to ViciDial, initial setup screen

You are required to change your password before you can continue on to Administration. A strong password has both lower case and upper case letters as well as at least one number. Your password must be from 2 to 20 characters in length and cannot contain any characters that are not letters or numbers. Be sure that this password is something that you can remember, because as soon as you complete this initial setup screen you will be prompted to enter your new password in again to log back in to Administration

New Password: Strength: **Weak**

The next three default passwords are defined in the System Settings section, and you can change them after you define them here. It is a good idea to make these passwords strong so that no one can hack into your phone accounts and place phone calls without you knowing. The default registration password used when new phones are added to the system as the SIP or LAX VOIP phone password. The default phone web login password used when new phones are added to the system, as the phone password that an agent would use in the ViciDial Agent Interface. The default server password used when new servers are added to the system for servers to communicate with each other.

Default Phone Registration Password: test Strength: **Weak**

Default Phone Login Password: test Strength: **Weak**

Default Server Password: test Strength: **Weak**

The next two settings are also defined in the System Settings section, and you can change them after you define them here. You should set the Default Local GMT to the timezone that your agents want to be in. The Voicemail zone is the listing of voicemail timezones that voicemail messages will be time logged with when new messages are left.

Default Local GMT: -5.00 (Do NOT Adjust for DST) ?

Default Voicemail Zone: eastern ?

SUBMIT

VERSION: 2.4-364s
 BUILD: 120409-1136
 © 2012 ViciDial Group

Figure 2. Initial Dialer Setup Screen

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

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

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

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

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

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

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

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

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

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

1. Go to the VICIdial administration page, go to the ADMIN section, click on PHONES and click on the ADD A NEW PHONE link
2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:
 - phone extension: 201
 - dialplan number: 201
 - voicemail box: 201
 - outbound callerid: 7275551212
 - <we will leave phone and computer IP address fields blank>
 - server ip: 10.10.10.15 (set this to your server ip)
 - agent screen login: 201
 - login password: test
 - registration password: test
 - status: ACTIVE
 - active account: Y
 - phone type: SIP
 - full name: sip201
 - <we will leave company and picture fields blank>
 - client protocol: SIP
 - local gmst: -5 (GMT timezone, you should NOT include adjusting for Daylight Savings Time)
(0 is the UK, +1 is most of Europe, -5 is EST in the USA, -8 is PST in the USA)
 - NOTE: The “Password strength” display next to the password fields will give you a good indication of how secure the password you entered will be. If possible, you should try to use lower case and upper case letters as well as numbers in a password.
 - NOTE: for additional security, change “Phone Context” to *phones*. This disables the ability for agents to make calls directly from the phones, they must log into a campaign in the dialer. This also adds another layer of security against hackers that may attempt to register their own phones to your dialer.
3. Click the submit button to create this phone record. After one minute, the phone will be active in the system.

NOTE: if you are using a phone outside of a local network, we would strongly recommend changing the “Registration Password” field for enhanced security. This field is what you would use as the phone secret or password when you register it on your soft-phone or hard-phone.

4. Go to the Agent's phone and configure the server(or proxy) for the same IP address as you selected above in step 2 for Server-IP, and the login(username) is the Extension as defined above in step 2 and password(secret) is defined as the "Registration Password" field in the Phones entry, then click to "Register" if that option is available, or restart the phone or application.
5. Have the agent log into the VICIdial agent interface script with the phone login(Login) of "201" and phone password(Login Password) of "test".
6. Within a few seconds the agent's phone should ring and they will be logged into VICIdial and can proceed as normal to take calls. If your system uses an embedded web phone, then you will need to click on a link on the screen to log that web-based phone into your session.

NOTES:

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

C. Add a new Carrier trunk to your system

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

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)

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

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

Account Entry Notes:

- “disallow=all” clears the preferred codecs list, you then specify the codecs you want to allow, in this instance we have chosen to only allow “ulaw”
- “type=friend” allows calls in from the carrier as well as out through the carrier
- “context=trunkinbound” this is context in the dialplan that will receive inbound calls from this carrier
- If you need to add E1/T1/PRI/POTS/FXO/FXS lines, you will first need a reliable telco connection card for your computer, we recommend Sangoma cards(<http://www.sangoma.com>), but Digium or Rhino will usually work as well. You will need to coordinate with your systems administrator to set up the zaptel/dahdi conf files properly as well as adding the dialplan entries to dial out these PSTN lines. There are sample zaptel.conf and zapata.conf files included with VICIdial for these kinds of connections(/docs/conf_examples/zaptel... and zapata...), as well as sample dialplan entries in the extensions.conf sample files:

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

```
TRUNK=Zap/r1
```

```
TRUNKX=Zap/r2
```

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

```
exten => _91NXXNXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
```

```
exten => _91NXXNXXXXXX,2,Dial(${TRUNKX}/${EXTEN:1},,To)
```

```
exten => _91NXXNXXXXXX,3,Hangup
```

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

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

1. Click on the CAMPAIGNS link at the top of the page to get to the CAMPAIGNS section and click on the ADD A NEW CAMPAIGN link
2. We will set the fields in the ADD A NEW CAMPAIGN form to the following values:
 - Campaign ID: TESTCAMP
 - Campaign Name: Test campaign for VICIdial
 - Active: Y
 - <we will leave park extension, park filename and web form blank for this tutorial>
 - Allow Closers: Y
 - Hopper Level: 5
 - Dial Method: MANUAL
 - Auto Dial Level: 0
 - Next Agent Call: oldest call finish
 - Local Call Time: 9am-9pm
 - <we will also leave voicemail, script and get_call_launch blank for this tutorial, there is a detailed explanation of all fields in the VICIdial CAMPAIGNS section of this manual>
3. Click submit to create this new campaign
4. Now that the campaign TESTCAMP has been created, you can see the Detail View of the Campaign Modification screen with many more options that can be set for the campaign. We will leave everything in default settings and move on to loading leads.
5. You now need to create a LIST to import your customer leads to. Click on the ADD A NEW LIST link.
6. For this tutorial we will fill in the following add list fields with these values:
 - List ID: 107
 - List Name: test list
 - Campaign: TESTCAMP
 - Active: Y
7. Click submit to create the LIST.
8. To get to the lead loading page, click on the LISTS link at the top of the screen to get to the LISTS section, then click on the LOAD NEW LEADS link to get to the 4th generation lead loader. From here you can import leads in the basic text pipe-delimited or tab-delimited format, a CSV file or a simple Excel spreadsheet. For this tutorial we will use the default tab-delimited text file.

NOTES: For the web-based lead loader, a tab-delimited or pipe delimited text file must end with “.txt”, a CSV(Comma Separated Values) file must end with “.csv” and an Excel file must end with either “.xls” or “.xlsx”. If you are loading a lead file that has commas in the fields, or you are having issues loading a CSV file, then you should try formatting the file as a Tab-delimited .txt file.

9. The standard format of this lead file is:

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

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

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

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

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

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

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

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

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

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

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

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

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

NOTE: There is also an optional paid lookup method using 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

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

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

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

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

Group: AGENTS

Description: VICIdial AGENTS

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

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

23. For this tutorial we will fill in the following add user fields with these values:

User Number: 7777

Password: 1234

Full Name: test agent

User Level: 1

User Group: AGENTS

<we will leave phone login and phone password blank for this tutorial>

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

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

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

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

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

VICIdial.php?pl=phone1&pp=test

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

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

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

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

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

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

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

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

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

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.

E. Change your outbound dialing campaign to use Predictive Dialing

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

1. Go to the Campaign Detail screen for your TESTCAMP campaign.
2. Change the Dial Method to ADAPT_TAPERED. This will change your Dial Level automatically to a 1.0 and it will never drop below that as long as you are using this Dial Method. Also, you will not be able to change what is in the dial level field manually while you are using an ADAPT_ dial method unless you check the ADAPT OVERRIDE check-box which will allow you to force a change in dial level even if you are in an ADAPT dial method.
3. Leave the “Available Only Tally” field set to “N”. You would only want to set this field to “Y” if you were dialing on a campaign with a very long pitch, or if you wanted extra assurances against dropping customer calls. Setting this field to “Y” will make it so that calls are only placed if there is an agent waiting for a call.
4. Set the “Drop Percentage Limit” to “3%”. This is the USA FTC limit of allowable dropped calls per 30-day average per campaign for consumer-based campaigns. You can make this higher or lower depending upon your tolerance for dropped calls. (A dropped or abandoned call is a call that is shown as answered by the carrier and was not able to be sent to an agent before the line was hung up)
5. Set the “Maximum Adapt Dial Level” to “3.0”. This number can be higher or lower depending upon the number of agents and the available number of outside lines that you have on your VICIdial servers. For example, if you have a T1 with 24 channels on it and you have 6 agents that will be dialing on that server for this shift, you should set this field to “4.0” for most efficient possible dialing in Predictive mode.
6. Set the “Latest Server Time” to “2100” for a 9PM stop time in your call center. This field is only used if your Dial Method is set to ADAPT_TAPERED and it uses the anticipated time of your last calls to calculate how strictly it should apply the target drop percentage setting. You should set this to the time when you are going to stop calling for the day.
7. Leave the “Adapt Intensity Modifier” field set to “0”. If you want the dialer to dial more aggressively then you can change this to a positive number. If you want the dialer to dial less aggressively then change this to a negative number.
8. Leave the “Dial Level Difference Target” field set to “0”. If you want to try to maintain one free agent at all times, then you should set this field to “-1”. If you want to always have one call in queue waiting for an agent, then you should set this field to “1”. You will most likely have a higher drop rate if you set this field to a high positive number.
9. Now that you have changed your Campaign Detail settings to use predictive dialing, you should log in to the VICIdial agent application, wait for the phone to ring and click on the “RESUME” button to start the dialer.

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

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

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

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.

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

This Tutorial might possibly 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 C above.
2. To take inbound numbers into VICIdial you will need to first setup an inbound group(or in-group) in the VICIdial admin.php page.
3. Go to the INBOUND section of the VICIdial admin website and click on the ADD A NEW IN-GROUP.
4. For this tutorial we will use the following values for the fields on the NEW IN-GROUP form:
 - Group ID: SALESLINE
 - Group Name: Primary Sales Line
 - Group Color: red
 - Active: Y
 - Web Form: <we leave this blank> If you have a CRM, put its search page address here.
 - Voicemail: <we leave this blank>
 - Next Agent Call: oldest_call_finish
 - Frontier Display: Y
 - Script: NONE
 - Get Call Launch: NONE

NOTE: the “web form” address can use custom variables just like the Script functionality can. To activate custom variables in the web form you just need to put “VAR” at the front of the URL, for example:

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

5. We will click submit to create the in-group, then we will see the expanded options of the in-group modification screen. In these fields we can define a call-time for the inbound group as well as what to do when the call comes in after hours. Here is also where we define music-on-hold and the periodic message to be played to the customer. For more information on these options, go to the in-groups section. For the purposes of this tutorial we will leave the default values in place.
6. The next step is to create the DID(Direct Inward Dialing, also known as DDI, Direct Dial-In) entry that will send the incoming call to the in-group that we just created. To get to the ADD A NEW DID ENTRY page you need to be in the INBOUND section, then you can click on the ADD NEW DID link.

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

DID Extension: 8002277655

DID Description: Inbound 800 number

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

Active: Y

DID Route: IN_GROUP

In-Group ID: SALESLINE (this is the in-group that we created above)

In-Group Call Handle Method: CID

In-Group Agent Search Method: LB

In-Group Phone Code: 1

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

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

In-Group Call Handle Method:

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

In-Group Agent Search Method:

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

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

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

Campaign ID: TEST_IN

Campaign Name: Closer and inbound campaign

Active: Y

<we will leave park extension, park filename and web form blank for this tutorial>

Allow Closers: Y

Hopper Level: 5

Auto Dial Level: 1

Next Agent Call: oldest call finish

Local Call Time: 24hours

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

NOTES:

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

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

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

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

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

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

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

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

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

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

19. When a call comes into the 800 number, the customer's 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.

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.

G. Set up a remote agent to be able to take calls from an Outbound Campaign or an Inbound Ingroup.

This feature in VICIdial allows remote agents to login at the beginning of the day to take inbound, outbound, or blended calls; until they log back out and deactivate their agent session. This is a good tool for sales people on the road or tech support where a technician may not be in the office and on the office phone system for the entire day. Anytime where the agent would need to take calls, has access to a phone, but no access to a computer. If recording is enabled for both the User & Campaign (either ALLCALLS or ALLFORCE), then the remote agents will be recorded also.

1. Go to the REMOTE AGENTS section of the VICIdial admin website and click on the ADD NEW REMOTE AGENTS.
2. For this tutorial we will use the these values for the fields on the NEW REMOTE AGENTS form:
User ID start: 7777 (this is the existing ID we created in Tutorial B)
Number of Lines: 1
Server IP: select your active server
External Extension: 917275551212 (this is the number you would dial from the Dialer system to get to the phone you want to call. It needs to contain the carrier prefix + 1 + the area code & phone number.)
Status: INACTIVE (this is what we change to ACTIVE when we are ready to take calls, and back to INACTIVE when we do not want to take calls anymore)
Campaign: TEST_IN
Inbound groups: check the SALESLINE check box (for outbound only dialing, do not select and Ingroup.)
3. Have the agent login to the vdremote.php page to activate their session to take calls:
<http://server-address/VICIdial/vdremote.php>
change the status from INACTIVE to ACTIVE and click SUBMIT
NOTE: This screen also allows for viewing of call information when calls come in.
4. When a call comes in to the SALESLINE in-group number and the 7777 agent is the next to take a call, a call will be placed to the "external extension" of the remote agent and the call will be passed to that line upon connection.
5. The remote agent can do things like view callerID of the caller and disposition the call in the vdremote.php screen if they want to and have access to a web browser while on a phone call.
6. When the remote agent is done taking calls for the session, they just need to login to vdremote.php, change their status to INACTIVE and click SUBMIT. The deactivation of the account can take up to one minute.

H. Set up the Audio Store, upload an audio prompt and record a prompt over the phone

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

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

1. Go to the “Admin” section of the VICIdial Admin website and click on the “System Settings” link in the sidebar.
2. Set the following fields:
 - Central Sound Control Active = 1
 - Sounds Web Server = <the server portion of your admin web address, i.e. 192.168.1.2>
 - Active Voicemail Server = <select the first, main or only VICIdial Asterisk server>
3. Click the “Submit” button at the bottom of the page, then click on the new “Audio Store” link in the sidebar on the left side of the screen.
4. On the Audio Store page you can upload audio files from your computer to the VICIdial system, as well as see the current audio files that are in the system. We recommend using only PCM 16bit 8k WAV files(i.e. demo.wav). After two minutes, the uploaded audio file should be copied to all of your VICIdial servers that are active on this system.
5. To record an audio prompt from a phone that is registered on the system, dial 8168 and following the instructions to recording a message(the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001). After two minutes this recording should be available in the Audio Store.
6. Now when you go to a Call Menu, In-Group, Music-On-Hold or another page that has a field with an “audio chooser” link next to it, you will be able to see the available audio prompts, sort them by filename, size and age, play the audio prompts to hear what they sound like and click on a prompt to fill that field with the prompt that you selected. When first opening the “audio chooser” the newest upload files will be at the top.

1. Set up your outbound campaign to do Answering Machine Detection(AMD)

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

Another method of Answering Machine Detection(AMD) that is available for use with VICIdial is the Sangoma Netborder CPD(Call Progress Detection) which is a paid-for per-channel licensed solution that can give you up to 97% AMD accuracy as well as lower your dropped calls rate. For more information on this option, please read the Sangoma CPA page in this manual or contact the VICIdial Group at www.vicidial.com

If you do not have a default VICIdial installation or a ViciBox Server ISO install of VICIdial, this Tutorial could require either a little systems administration knowledge or some help from your Systems Administrator . You also need to make sure that the optional AMD Asterisk application is loaded on your Asterisk server or this feature will not work(this is installed standard with the ViciBox Server ISO Installer).

1. Make sure that the following two sections are present in your dialplan(extensions.conf) file:
(if your system is a default or ViciBox Server ISO install, these are already set up)

```
; VICIdial_auto_dialer transfer script AMD with Load Balanced:
    exten => 8369,1,Playback(sip-silence)
    exten => 8369,2,AGI(agi://127.0.0.1:4577/call_log)
    exten => 8369,3,AMD(2000|2000|1000|5000|120|50|4|256)
    exten => 8369,4,AGI(VD_amd.agi,${EXTEN})
    exten => 8369,5,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
    exten => 8369,6,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
    exten => 8369,7,Hangup

; this is for playing a message to answering machine forwarded from AMD in VICIdial
; audio recording used are those that you recorded through 8168
    exten => 8320,1,AGI(VD_amd.agi,${EXTEN}-----YES)
    exten => 8320,2,Hangup
```

2. If you had to add the dialplan entries, then make sure you either restart asterisk, type "extensions reload" on the Asterisk CLI, or go to the Admin -> Servers entry and just click submit to initiate a new Asterisk dialplan reload.
3. Open the VICIdial admin web site (VICIdial/admin.php) and go to the Campaign Detail modification page for the TESTCAMP campaign.
4. To activate AMD you will need to change the "Campaign VDAD exten" to 8369 to have calls go

through the AMD-enabled call processor.

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

5. If you want to leave a message on the calls that are detected to be Answering Machines then you will switch the "AMD send to vm exten" field to Y and enter into the "Answering Machine Message" field the a pre-recorded audio prompt filename to play to the Answering Machine while it is recording. For this tutorial we will use vm-goodbye, or you can choose another prompt from the "audio chooser" link next to the field. You will need to make sure that you have recorded a customized audio recording to be played to put in this field, we often recommend having the message play twice(recording the message twice) if it is not too long to make sure the customer can listen to the entire message at least once. The message should be recorded in GSM format 8k-8bit mono or WAV format PCM 8k-16bit mono. Another option for this message is to use a VICIdial-attached phone to quickly record a prompt by dialing 8168 and following the instructions to recording a message(the pin number it asks for is 4321). Once the message is recorded, write down the prompt ID that it will read back to you (the prompt IDs start at 85100001) and simply place the prompt ID(like 85100008) into the "Answering Machine Message" field directly, or selecting it from the "audio chooser" link. For more information on the Audio Store and using custom audio prompts, see Tutorial H above.

J. Set up an auto-dial campaign to dial without any live agents and play a message

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

For this tutorial we will use the TESTCAMP campaign that was set up with leads loaded from tutorial D. We will also be using the remote agent that we set up in tutorial G to enable dialing without a live agent being logged in.

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

Play Message Immediately -

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

Play Message After Waiting a Set Number of Seconds -

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

Play Message After Waiting For Silence on the Line -

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

Full Answering Machine Detection -

This method is able to be set up using only the Admin web interface, no manual dialplan editing necessary. With this method you can more accurately leave messages on answering machines, although this is still not an exact science and may require some customizing of the AMD settings. The downsides to this method are that any delay in playing a message and some customers will hang up the phone and with answering machines you still have the possibility of missing some of the beginning of the recording on their machine. If using this method we usually recommend that you record your message twice in the recording file so that any portion of the message not heard at the beginning of a call will be played again.

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

2. The next step is to make the recordings and/or configuration changes to your dialplan(`extensions.conf`) needed to accomplish the message playback method you have selected.

Play Message Immediately -

Use the easy-prompt process to record your new prompt. Dial 8168 on your phone connected to your VICIdial server. You will be prompted for an ID (which is 4321 followed by the pound key). After logging in, you will hear the recording instructions; following the beep you can start recording your message. We recommend that you wait 2-3 seconds after the start of recording to begin speaking so that the message doesn't start playing as soon as a person picks up the phone. We also recommend reading your message twice on the recording to make sure your customers will hear the message in it's entirety. When you are done recording, press the pound key. You will then be presented with three options: press 1 to save the prompt, press 2 to listen to the prompt you just recorded or press 3 to re-record. Once you accept the recording, the filename of the recording will be played back to you twice(recording filenames start at 85100001). You can then place this number in the "External Extension" field of your remote agent modification screen to send calls immediately to this recording and then will be hung up when the recording file has finished playing. In the List modification page, for the leads that you will be calling, you will only see the following statuses when using this method:

B - Busy,

NA - No answer(Ring-no-answer, Disconnect, Invalid)

NEW – Lead has not been called

QUEUE – Call was picked up and started playing message

Play Message After Waiting a Set Number of Seconds -

Use the easy-prompt process to record your new prompt.(Follow the same procedure as the above step for this only you don't need to delay the beginning by 2-3 seconds) Take your prompt number and put it into the "Playback" lines as shown in the dialplan(`extensions.conf`) entries below:

(if your system is a default, these are already set up)

```
; this is for playing a message to answering machine forwarded from AMD in VICIdial
exten => _7851XXXXX,1,WaitForSilence(2000,2) ; AMD got machine. leave message
exten => _7851XXXXX,2,Playback(${EXTEN:1})
exten => _7851XXXXX,3,AGI(VD_amd_post.agi,${EXTEN:1})
exten => _7851XXXXX,4,Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8364(for the BROADCAST setting) and set the "External Extension" in the Remote Agent screen to 8320(or the extension you have put the entries above into) . Now when the call is answered the status of the lead will change to "PU", and after the recording is played the first time, the status of the lead will be changed to "AL" and the recording will be played again just to ensure the customer has heard it.

Play Message After Waiting For Silence -

Use the easy-prompt process to record your new prompt.(Follow the same procedure as the above step for this only you don't need to delay the beginning by 2-3 seconds) Take your prompt number and put it into the "Playback" line as shown in the dialplan(extensions.conf) entries below:
(if your system is a default, these are already set up)

```
exten => 8320,1,WaitForSilence(2000,2)
exten => 8320,2,Playback(85100001)
exten => 8320,3,AGI(VD_amd_post.agi,${EXTEN})
exten => 8320,4,Playback(85100001)
exten => 8320,5,Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8364(for the BROADCAST AGI script) and set the "External Extension" in the Remote Agent screen to 8320(or the extension you have put the entries above into). Now when the call is answered the status of the lead will change to "PU", and after the recording is played the first time, the status of the lead will be changed to "AL" and the recording will be played again just to ensure the customer has heard it.

Full Answering Machine Detection -

Use the easy-prompt process to record your new prompt.(Follow the same procedure as the above step for this, except you don't need to delay the beginning by 2-3 seconds) Take your prompt number and put it into the "Playback" line as shown in the dialplan(extensions.conf) entries below:
(if your system is a default, these are already set up)

```
exten => 8369,1,Playback(sip-silence)
exten => 8369,2,AGI(agi://127.0.0.1:4577/call_log)
exten => 8369,3,AMD(2000|2000|1000|5000|120|50|4|256)
exten => 8369,4,AGI(VD_amd.agi,${EXTEN})
exten => 8369,5,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
exten => 8369,6,AGI(agi-VDAD_ALL_outbound.agi,NORMAL-----LB)
exten => 8369,7,Hangup

exten => _8320*.,1,AGI(VD_amd.agi,${EXTEN}-----YES)
exten => _8320*.,2,Hangup
```

Then set the "Campaign VDAD exten" in the Campaign Detail screen to 8369(or whatever extension you defined for those lines), set the "Answering Machine Message" field to the audio prompt that you want to be played and set the "AMD Send to VM exten" field is set to "Y". Also, the "Waitforsilence options" can be used to have the playback of the message wait for a set number of timed silence once or twice as well as a maximum wait time before playing the prompt(setting this field to "2000,2,30" would mean waiting twice for 2 seconds of silence before playing, and waiting no more than 30 seconds total). As soon as the AMD detects the answering machine, the status will be changed to "AA", and as soon as the call is sent to a recording for playback, the status will be changed to "AM". Now after the recording is played completely for the first time, the status of the lead will be changed to "AL" and the recording will be played again just to ensure the customer has heard it.

NOTE: The "Answering Machine Message" field is able to be set up as a Cepstral Text-to-speech(TTS) prompt, meaning that you can take information from the VICIdial list and read it back within the message that is being played. For more information on TTS functionality, see the chapter on Cepstral TTS further down in this manual.

3. To set the Remote Agent up and start dialing first go to the Remote Agent Modification screen. If you are using Full Answering Machine Detection you will need to set the "External Extension" field to 8321, for the play-message-immediately method this field can be populated with anything and for the other two methods this field should be populated with 8320(or whatever extension you used for Playback).
4. To start dialing you need to change the status to ACTIVE and click submit.
5. When you are finished dialing you need to change the status to INACTIVE. This may take a minute to stop dialing.

K. Set up a “press-1” type, or survey, outbound dialing campaign

For this tutorial we will be adding the ability to dial out and have the customer presented with a question to which they can respond by pressing a phone button(DTMF) key before the call is sent on to an agent or another destination. It should be mentioned that if you are planning on doing this kind of calling to consumers in the USA, as of September 1, 2009 you will have to have written permission from each person you are calling allowing you to do so according to FTC regulations. For more information on this, go to the FTC regulations section of the manual which is located after the Tutorials or go to the FTC website at <http://www.ftc.gov> .

1. Go to the Campaign Detail screen of the TESTCAMP campaign and click on the SURVEY sub-menu link in the third row from the top of the screen of links.
2. We will be filling in the fields with the following values:
 - Survey First Audio File – 85100008 (this would be one of the audio prompts you recorded)
 - Survey DTMF Digits – 1238 (These are the allowable digits the customer can press)
 - Survey Not Interested Digit – 8 (Must be one of the DTMF digits above)
 - Survey Opt-in Audio File – 85100009
 - Survey Not Interested Audio File – 85100010
 - Survey Method – AGENT_XFER (to send the customer to an agent after the survey question)
 - Survey No-Response Action – OPTIN (If customer does not press anything, call sent through)
 - Survey Not Interested Status – NI (status to put in system if customer presses NI digit)
 - Survey Response Digit Map – 1-DEMOCRAT|2-REPUBLICAN|3-IND|8-NI|X-NONE|
This is a pipe-separated list of the possible DTMF choices and what they mean
<We leave Campaign Recording Directory blank we are not using CAMPREC_60_WAV>
<We will leave Voicemail blank since we are not using VOICEMAIL method>
<We will leave the third and fourth set of options blank as well>

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

NOTE: The audio prompt fields in this section are able to be set up as a Cepstral Text-to-speech(TTS) prompts, meaning that you can take information from the VICIdial list and read it back within the message that is being played. For more information on TTS functionality, see the chapter on Cepstral TTS later in this manual.

3. Now that the campaign options are set, click on the Campaign Detail screen and change the VDAD exten to 8366, or another extension set that uses the agi-VDAD_ALL_outbound.agi script with the SURVEYCAMP flag(or 8374 if you are doing TTS prompts) Also, make sure that your Campaign's Dial Method is set to RATIO and your dial level is set to “1”.

4. Now the campaign can be run as it normal, except that when a customer Answers, they will be played the first prompt, and will be expected to press a digit to indicate their response to the question. If they do not press a digit, and the No-Response action is set to OPTIN, they will be sent on to an agent after the timeout. If they do not press a digit, and the No-Response action is set to OPTOUT, then the customer line will be hung up.

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

L. Set up blended in/outbound calling with your inbound-enabled campaign

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

1. Go to the LISTS section of the VICIdial admin pages and load leads into a new list just like we did in step 5 of tutorial D.
2. Make a new LIST for these new leads. We will use list ID 108 for this tutorial.
3. Set list 108 to active and go to the Campaign Modification page for the TEST_IN Inbound-enabled campaign.
4. Set the local call time to 9am-9pm so that we do not place calls out after acceptable hours.
5. Make sure the dial level is set to 1 and the dial_method is set to RATIO, or one of the ADAPT_... dial methods, for the TEST_IN campaign.
6. Go to the user modification page for user 7777 and change the "Closer Default Blended" field to "1" so that the check box for blended calling is selected by default when this agent logs in.
7. Login to the agent interface as user 7777 and select SALESLINE to take calls from, then click submit.
8. Click on the RESUME button and if there are no calls coming in you will start to dial outbound calls. If an inbound call comes in it will be queued and then sent to you after you finish the initial outbound call.
9. If you wish to stop dialing you can simply change the list of leads to inactive(set active to "N") or log out and back in and de-select the BLENDED check box at the bottom of the green inbound-group selection screen.

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

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

M. Add a VICIdial External-user Agent on their home phone

This tutorial goes over the steps needed to create an EXTERNAL phone entry that will allow an agent to log in as a VICIdial user from their home phone or mobile phone.

1. Go to the VICIdial administration page, go to the Admin → PHONES section and click on the ADD A NEW PHONE link
2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:
 - phone extension: E7777
 - dialplan number: 917275551212 (this is where you put the agent's phone number as you would dial it from a phone on your phone system)
 - voicemail box: 0
 - outbound callerid: 7275551212
 - <we will leave phone and computer IP address fields blank>
 - server ip: 10.10.10.15 (set this to your server ip)
 - agent screen login: E7777
 - login password: test
 - registration password: test
 - status: ACTIVE
 - active account: Y
 - phone type: external
 - full name: ext agent
 - <we will leave company and picture fields blank>
 - client protocol: EXTERNAL
 - local gmt: -5 (GMT timezone, this does NOT include adjusting for Daylight Savings Time)
3. Click submit to create this phone record and logout of the VICIdial admin interface.
4. Have the agent log into the agent interface with the phone login of "E7777" and phone login password of "test".
5. Within a few seconds the agent's phone should ring and they will be logged into VICIdial and can proceed as normal to take calls.

N. Add a DID and point it to go to a specific logged-in VICIdial Agent

With VICIdial DIDs you have several choices in where to send calls. One of those options is to send a call to go to a user that is logged in as a VICIdial agent in the agent interface. The example below assumes that the phone number 727-555-6666 is incoming on one of your carrier trunks, and that the carrier delivers calls to that number with 7275556666 as the inbound DID.

1. The first step is to create the DID entry that will send the incoming call to the agent. To get to the ADD A NEW DID ENTRY page you need to be in the IN-GROUPS section, then you can click on the ADD NEW DID link.
2. On the Create DID page you will put the following values in:
DID Extension: 7275556666
DID Description: Direct agent extension for user 6666
3. Then you will click submit to create the DID entry and you will see more options which you should modify:
Active: Y
DID Route: AGENT
User Agent: 6666
User Route Settings In-Group: AGENTDIRECT
User Unavailable Action: VOICEMAIL
Voicemail Box: 6666 <you need to go to Admin → Voicemail to create this voicemail box>
 <we will leave the other fields in their default values>

In the above example, the call will go into the AGENTDIRECT in-group where it will wait until the drop timeout of that In-Group and if the agent is still not available the call will be directed to the Voicemail box 6666. You can also send the call to another in-group or even an extension instead of sending it to voicemail. You can set up multiple AGENTDIRECT in-groups to be able to use different settings for different groups of AGENTDIRECT calls. They just need to have AGENTDIRECT at the beginning of the in-group name, such as AGENTDIRECT2, AGENTDIRECTA, etc...

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

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

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

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

2. On the Create CALL MENU page you will put the following values in:

Menu ID: WELCOME_MENU

Menu Name: General welcome menu

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

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

Menu Invalid Prompt: invalid

Menu Repeat: 2

Option: 1 <select "1" from the pull-down menu>

Description: Sales

Route: INGROU

In-Group: SALESLINE

Handle Method: CID

List ID: 998

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

Description: Tech Support

Route: INGROU

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

Handle Method: CID

List ID: 998

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

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

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

4. The next step is to create the DID entry that will send calls to the main inbound number to this new Call Menu

5. Click on the "Add A New DID" link in the left sidebar. On the Create DID page you will put the following values in:

DID Extension: 7275553000

DID Description: Main Number Route to Call Menu

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

Active: Y

DID Route: CALLMENU

Call Menu: WELCOME_MENU

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

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

P. Add a “If you know the extension...” option to a Call Menu using with AGENTDIRECT

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

NOTE: This tutorial has changed significantly from the one in the previous 2.2.1 release. Now you can restrict transfers to only agents that are logged in if you like, and the system will validate for active agents as well.

There are two different methods to configure this particular call flow; either creating a Custom Dialplan Entry, or using the AGI scripting. We'll explain how to configure both.

Custom Dialplan configuration:

1. Click on the “Admin” menu on the left sidebar, then click on the “System Settings” link below that
2. Change the field “Allow Custom Dialplan Entries” to “1” then click SUBMIT
3. Go back to the WELCOME_MENU Call Menu that you created(In-Groups → Show Call Menus → Modify WELCOME_MENU)
4. Add another audio file to the Menu Prompt so that it looks like this:
welcome|for-sales|press|.digits/1|for-tech-support|press|.digits/2|silence|if-u-know-ext-dial
Or you can simply record your own audio prompt through the 8168 extension, or upload an audio file to the Audio Store(Admin → Audio Store)

5. Scroll to the bottom of the screen and enter the following into the “Custom Dialplan Entry” field:

```
exten => _XXXX,1,Playback(/var/lib/asterisk/sounds/beep)
exten => _XXXX,x,AGI(agi-AGENT_route.agi,default---AGENTDIRECT---ACTIVE)
```

NOTE: The above assumes 4-digit agent Ids(for the four X's)

The options for the “agi-AGENT_route.agi” program are as follows:

1. the DID entry to use for In-group initiation settings ('default' is default)
2. the agentdirect in-group to send the calls to ('AGENTDIRECT' is default)
3. transfer only to ACTIVE in the system agent or VICIdial LOGGED_IN agent ('ACTIVE' is default)

6. Click submit to save your changes

7. Now you can call into the main number(727-555-3000), wait for the message to start, and then enter the 4-digit user ID of either 6666 or 7777 and you will be sent directly to their AGENTDIRECT In-Group queue, or if they are unavailable, to their User-defined voicemail box.

API scripting configuration:

1. Select the WELCOME_MENU Call Menu that you created(In-Groups → Show Call Menus → Modify WELCOME_MENU).
2. Add another audio file to the Menu Prompt so that it looks like this:

welcome|for-sales|press|.digits/1|for-tech-support|press|.digits/2|silence|if-u-know-ext-dial

Or you can simply record your own audio prompt through the 8168 extension, or upload an audio file to the Audio Store(Admin → Audio Store)

3. In the Call Menu, select the option indicated in the recording for “Dial by Extension” and set “Route” to “AGI”.

4. Enter the following to the “AGI” field:

agi-AGENT_route.agi,default---AGENTDIRECT---ACTIVE---if-u-know-ext-dial---X---

invalid---please-try-again---3---TEST_IN3---sip-silence---outside-transfer

NOTE: The AGI script can only route calls to the AGENTDIRECT (or AGENTDIRECT type) ingoup.

The options for the AGI script are as follows:

1. ACTIVE Will transfer only to ACTIVE (any active agent in the dialer) or LOGGED_IN (any agent currently logged into AGENTDIRECT). ACTIVE is default.
2. X = The number of digits required for user ID validation, X will allow anything, this will only be enforced if "prompt for user ID" prompt is populated.
3. invalid = audio filename for invalid selection, agent not available (invalid is default)

5. Click submit to save your changes

6. Now you can call into the main number(727-555-3000), wait for the message to start, and then enter the 4-digit user ID of either 6666 or 7777 and you will be sent directly to their AGENTDIRECT In-Group queue, or if they are unavailable, to their User-defined voicemail box.

Q. Add External Phone entry for your mobile phone then live monitor using the Real-time Report

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

1. Go to the VICIdial administration page, go to the Admin → PHONES section and click on the ADD A NEW PHONE link
2. For this tutorial we will use the following values for the fields on the ADD A NEW PHONE form:
 - phone extension: monitor_cell
 - dialplan number: 917275551234 (this is where you put your cellphone number as you would dial it from a phone on your phone system 9 + 1 + area code + number)
 - voicemail box: 8300
 - outbound callerid: 7275551234
 - <we will leave phone and computer IP address fields blank>
 - server ip: 10.10.10.15 (set this to your server ip)
 - agent screen login: monitor_cell
 - login password: test
 - registration password: test
 - phone type: external status: ACTIVE
 - active account: Y
 - phone type: external
 - full name: manager cell
 - <we will leave company and picture fields blank>
 - client protocol: EXTERNAL
 - local gmt: -5 (GMT timezone, this does NOT include adjusting for Daylight Savings Time)
3. Make sure that your user account is level 7, or above, and has the settings “Agent API Access” and “View Reports” set to “1” in the User Modification page. The API should be active in the Admin → System Settings page.
4. Go to the Real-time Report and click on the “Choose Report Display Options” link at the top of the page, select the campaigns you want to view activity for, set Monitor to “MONITOR” and put the following in the Phone field “monitor_cell”(the Phones “extension” of the phone entry you want to be called with the blind monitored session). Then click submit. For an image of this, go to Figure 34.
5. Now you will see a LISTEN column show up with the agent listings within the report. To monitor one of the agents simply click on the LISTEN link next to the User of the agent you want to listen to. This will launch a phone call to your cellphone. When you are done, simply hang up the phone and click to listen to another agent.

R. Creating Custom Fields

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

1. To access custom fields, you will need to set “Enable Custom List Fields” to 1.
2. Then “Custom Fields Modify” will need to enabled for the User that will be creating the custom fields. That field is located in the User modifications page, beneath “Amin Interface Options”.
3. Select “Lists”, and click on the list you wish to add custom field to. Scroll to the bottom of the list modification page and select the link “Custom fields defined for this list:0”. Once the additional fields have been created on this list, the 0 will be replaced with the total number of custom fields.
4. Custom fields can be used to create a wide range of field types (See the Custom Fields section of this manual for more information), but for this tutorial we will create a multiple choice pulldown menu. It's a common request and is more complex than creating a simple text field.

New Field Rank: 1

New Field Order: 1

Field Label: favorite_color (This is the unique database identifier for this custom field. After this has been submitted, this will be the only field that can not be edited)

Field Name: What is your favorite color? (This is what will appear beside the field, in the agent interface, that prompts the agent to ask for this information.)

Field Name Position: LEFT (This is where the Field Name will appear, in relation to the custom field.)

Field Description: Favorite Color (The description of the field that appears in the Admin interface.)

Field Help: Select from pulldown (These are the additional instructions the agent will see if they select the “help” link next this custom field.)

Field Type: MULTI (This determines the type of field this will be. I've selected MULTI to create a pulldown menu of possible options.)

Field Options: red, Red
blue, Blue
silver, Silver

(the Field Options are entirely dependent on Field Type. For the pulldown example, each line represents a possible entry. First is how the response will appear in the database. Then, separated by a comma, is how the entry would appear on the pulldown in the agent's interface.)

Option Position: HORIZONTAL (How the options for this custom field are arranged.)

Field Size: 3 (This field will mean different things, depending on what Field Type was chosen. For MULTI, it represents the number of options that will be visible when the agent clicks the pulldown menu. In this case, I want them to see all 3 options.)

Field Max: blank (Another Field that will mean different things depending on what Field Type was selected. It's not used for MULTI, so leave it empty.)

Field Default: NULL (This option already placed in the field to start. If the agent does not

update this field while on the phone with the customer, this will be submitted as the response. This Field must have either contain data or be NULL, but it can not be left blank. You will receive an error attempting to load leads onto a list that has left this field blank.)

Field Required: NO (This field is not yet functional so you can leave this set at the default entry.)

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

S. Brief overview of Cepstral Text To Speech software integration.

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

1. To add a TTS prompt, first go the Text To Speech page (in the Admin section) and click on the “Add A New TTS Entry”. Fill out all of the fields.
2. For TTS Text, here is a very simple TTS script that states. "If this is FIRSTNAME LASTNAME please press one. If this is not FIRSTNAME LASTNAME please hang up now." The example will play recordings for the static audio, while using lead table information to generate the TTS portion. It uses four statically recorded audio files. Which are:

if-this-is.wav
please-press-one.wav
if-this-is-not.wav
please-hang-up-now.wav

Here is the actual TTS Text:

```
<audio src='/var/lib/asterisk/sounds/if-this-is.wav' /> --A--first_name--B-- --A--last_name--B--,  
<audio src='/var/lib/asterisk/sounds/please-press-one.wav' /> <audio src='/var/lib/asterisk/sounds/if-  
this-is-not.wav' /> --A--first_name--B-- --A--last_name--B--,<audio  
src='/var/lib/asterisk/sounds/please-hang-up-now.wav' />
```

3. Please note that the audio store places audio files in the /var/lib/asterisk/sounds directory. If you want to use files in a different directory you can, but you need to adjust the path accordingly. Also keep in mind that you have the voice William-8kHz install. You need to include the '-8kHz' at the end.
4. The TTS text section can use any of the Vicidial Script variables that are available in the Script section.
5. Once the TTS Entry is added, go into the campaign modification page, and select the Survey link at the top. Any of the audio files can be replaced with a TTS entry. To do so, type 'TTSentry_id' in the field. Where entry_id is the TTS entry id you put in earlier. For instance if I named the above TTS script 'simple_tts_entry', I would put into the audio file field 'TTSsimple_tts_entry'.
6. The main thing to consider regarding TTS is that things need to be perfect in order for it to work correctly. If there are typo's in the TTS entry you can have very strange things happen.

Cepstral uses SSML for its mark up. The TTS Text section of the entry takes SSML and passes it to Cepstral. This is important when attempting more complex creations. For instance, to have it read off an account id to the caller; you need to use an SSML directive so that it does not treat it like a complete

number. For example, Cepstral would normally read “12574” as “twelve thousand five hundred and seventy four”. However, if you pass it as:

`<say-as type='acronym'>12574</say-as>` it will read that as 'one two five seven four'.

Cepstral has a well supported forum at:

<http://cepstral.com/support/forum/>

You can find more information on SSML here:

<http://www.w3.org/TR/speech-synthesis/>

http://en.wikipedia.org/wiki/Speech_Synthesis_Markup_Language

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 February 2012, has over 209,000,000 phone numbers in it. This is an opt-in list that is free for consumers and is maintained by the FTC. Companies who place outbound calls to solicit sales from consumers must filter their calling lists against the DNC list at least once a month. Penalties for calling customers on this list can result in thousands of dollars in fines for each violation and increased oversight from the FTC. To gain access to the list you need to register with the FTC as a Seller company. The full national DNC list with all area codes in it costs about \$14,000 per year as of September, 2006. It is illegal to share a list with another seller company or offer filtering services to other companies. There are also some loopholes or ways around having to filter your lists against the DNC list:

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

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

FTC Safe Harbor Regulations

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

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

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

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

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

The fifth and final provision of Safe Harbor is that the company must maintain records of its calling for up to 2 years and produce those records upon request. For VICIdial, these records are kept in the database indefinitely. There is an optional archiving process for call logs that may take call logs out of the easily searchable log tables, but they are still stored on the system.

Other FTC Regulations

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

All outbound telemarketing calls must send an outbound CallerID number when calling consumers. This number must be both active, and contain basic information about the company, when it is called by the consumer. It also must allow for the consumer to request to not be called again about this offer. For VICIdial, use the “Campaign 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 that went into effect in September of 2009 that outlawed the use of automated dialing without calls going to an agent (including broadcast dialing, robo-calling and press-1 dialing) unless you have the expressed written permission from the person that you are calling. Also, in February of 2012 the FCC (Federal Communications Commission) also came out with similar rules for non-agent auto-dialing.

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

SPECIFIC USA STATE REGULATIONS

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

Local Calling Times

Several states have different allowable calling times during different days of the week and times of the day. For example, here is a listing of the state-specific call times that are built-in to VICIdial and can be activated:

- **Alabama(AL)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Indiana(IN)** - Calling only allowed from 9am-8pm Mon-Sun
- **Kentucky(KY)** - Calling only allowed from 10am-9pm Mon-Sun
- **Louisiana(LA)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Maine(ME)** - Calling only allowed from 9am-5pm Mon-Sun
- **Massachusetts(MA)** - Calling only allowed from 9am-8pm Mon-Sun
- **Mississippi(MS)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Nevada(NV)** - Calling only allowed from 9am-8pm Mon-Sun
- **Pennsylvania(PN)** - Calling only allowed from 9am-9pm Mon-Sat and 1:30pm-9pm on Sundays
- **Rhode Island(RI)** - Calling only allowed from 9am-6pm Mon-Fri, 10am-5pm Sat and none on Sun.
- **South Carolina(SC)** - Calling only allowed from 9am-7pm Mon-Sun
- **South Dakota(SD)** - No calling allowed on Sundays
- **Texas(TX)** - Calling only allowed from 9am-9pm Mon-Sat and 12pm-9pm on Sundays
- **Utah(UT)** - Calling only allowed from 9am-8pm Mon-Sat and no calling allowed on Sundays
- **Wyoming(WY)** - Calling only allowed from 9am-8pm Mon-Sun

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

Telemarketing Prohibited Holidays and Other Prohibitions

There are also several holidays where telemarketing is prohibited, they vary from state to state and can vary from year to year. Some examples of telemarketing-prohibited holidays are:

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

- **Memorial Day** - May 29 (last Monday in May), Alabama/Louisiana/Rhode Island/Utah
- **Jefferson Davis' Birthday** - June 5, Alabama
- **Fourth of July**- July 4, Alabama/Louisiana/Rhode Island/Utah and July 3 in Louisiana
- **Pioneer Day** – July 24, Utah
- **Victory Day** - August 14, Rhode Island
- **Labor Day** – September 4 (first Monday in September), Alabama/Louisiana/Rhode Island/Utah
- **Columbus Day** – October 9 (second Monday in October), Alabama/Rhode Island/Utah
- **All Saints Day** - November 1, Louisiana
- **Election Day** - November 7(always a Tuesday), Louisiana/Rhode Island
- **Veterans Day** - November 10, Alabama/Louisiana/Utah and November 11, Alabama/Rhode Island
- **Thanksgiving Day** – November 23 (fourth Thursday in November), Alabama/Louisiana/Rhode Island/Utah and the day after Thanksgiving, Louisiana
- **Christmas Day** – December 25, Alabama/Louisiana/Rhode Island/Utah

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

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

State-specific DNC lists

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

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

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

Recording of Conversations Regulations

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

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

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

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

FCC Regulations

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

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.

VICdial
ADMINISTRATION

HOME | Timeclock | Logout (6666) Tuesday April 24, 2012 14:22:13 PM

USER LISTINGS: [show all users](#)

USER ID	FULL NAME	LEVEL	GROUP	ACTIVE	LINKS
6666	Admin	9	ADMIN	Y	MODIFY STATS STATUS TIME

Users

- [Show Users](#)
- [Add A New User](#)
- [Copy User](#)
- [Search For A User](#)
- [User Stats](#)
- [User Status](#)
- [Time Sheet](#)

Campaigns

- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)
- [Remote Agents](#)
- [Admin](#)
- [Reports](#)

VERSION: 2.4-364a
BUILD: 120409-1136
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Figure 3. VICdial Users List

VICdial USERS

The very first screen you see when you log in to the VICdial administration interface is the Users List. This is a full listing of every active VICdial 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 VICdial add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted, to save space and duplication. When adding a new user, you must make sure that you set the User ID, full name, password and user group or the submission will not be accepted. Please make sure that the User ID you have chosen does not have any spaces or punctuation, only letters or numbers. This is also a good time to mention that nothing in VICdial should contain a created “name” or “ID” that starts with “0”. Leading zeroes have been know to cause problems, so we recommend starting with positive integers. Once you create a user, you will not be able to change that userID unless you delete the user and re-create it again with a different userID. You cannot have duplicate User IDs in the system, and User IDs must be between 2 and 20 characters in length. If you want to use features like “If you know the extension...” as mentioned in Tutorial P, or you want to use agent dial-in to allow agents to connect to the system, then the User ID must contain only numbers.

Modify User

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

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

Agent Interface Options

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

Admin Interface Options

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

Descriptions of VICIdial user fields

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

User ID - This field is where you put the VICIdial users ID number, can be up to 20 characters in length, Must be at least 2 characters in length with no spaces or punctuation of any kind. We recommend using only digits for the User ID, especially if you will want your agents to be able to use the dial-in feature.

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

Note: There is now a “Strength” indicator for passwords in VICIdial. It encourages use of upper & lower case letters, along with special characters and numbers, to ensure password security.

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

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

User Group - This menu is where you select the VICIdial user group that this user will belong to. The

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

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

NOTE: The "user_login_first" option must be enabled on the back-end of the server first, for this feature to work.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

call log. Y will allow showing the user call log. Default is DISABLED.

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

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

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

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

Inbound Groups - This is a user interface option where a manager can select, with a check in the checkbox, the inbound groups they want that user to receive calls from if they have logged into the CLOSER campaign. These groups will show the last set of in-groups selected by the agent. You should only alter these when an agent is logged out because they are populated while an agent is logged in and any changes you have made while an agent is already logged in will not stay in the system. Also in this section is the ability to give the agent a 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.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Modify In-Groups - The field allows users to modify Inbound/Ingroups. Default is 0 – not active

Campaign Detail – With this field enabled, users have access to the the Campaign Detail View. With the feature disabled, users can only access the Campaign Basic View. Default is 0 – not active

Delete Campaigns - This option if set to 1 allows the user to delete VICIdial campaigns from the system. Default is 0 – not active

Delete In-Groups - This option if set to 1 allows the user to delete VICIdial In-Groups from the system. Default is 0 – not active

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Modify Contacts - This option allows the user to view and make changes to the "Contacts" settings in

the Admin section. Default is 0 - not active.

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

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

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

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

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

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

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

Delete A User

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

Copy A User

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

Search For Users

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

More User Information

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

User Time Sheet

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

User Status

This report will only show you information if the user is actively logged in to the agent interface. From this screen you can emergency log the agent out or log them in or out of the VICIdial Timeclock. This screen allows you to see the dialer the agent is logged into, their session, Phone extension, current campaign, and ingroups.

User Stats

This page is a collection of the following reports: AGENT TALK TIME AND STATUS, AGENT LOGIN/LOGOUT TIME, TIMECLOCK LOGIN/LOGOUT TIME, CLOSER IN-GROUP SELECTION LOGS, OUTBOUND CALLS FOR THIS TIME PERIOD, INBOUND/CLOSER CALLS FOR THIS TIME PERIOD, AGENT ACTIVITY FOR THIS TIME PERIOD, RECORDINGS FOR THIS TIME PERIOD, MANUAL OUTBOUND CALLS FOR THIS TIME PERIOD, LEAD SEARCHES FOR THIS TIME PERIOD, PREVIEW LEAD SKIPS FOR THIS TIME PERIOD. They can be queried for one or a string of days.

User Multiple-Day Status Report

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

User Territories

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

User Callbacks

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

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.

[HOME](#) | [Timeclock](#) | [Logout](#) (6666)

[Show Campaigns](#) | [Add A New Campaign](#) | [Copy Campaign](#) | [Real-Time Campaigns Summary](#)

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[Admin](#)
[Reports](#)

VERSION: 2.4-364a
 BUILD: 120409-1136
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CAMPAIGN LISTINGS:

CAMPAIGN ID	NAME	ACTIVE	GROUP	DIAL METHOD	LEVEL	LEAD ORDER	DIAL STATUSES	MODIFY
1000	TestCamp	Y	--ALL--	MANUAL	1	DOWN	NEW -	MODIFY

Figure 4. VICIdial Campaigns List

VICIdial CAMPAIGNS

When you click on the CAMPAIGNS link at the top of the admin screen you will enter the Campaigns section. This starts with a full listing of every VICIdial campaign in the system with its campaign ID, name, active state, administrative User Group, dial method & level, lead order, dial statuses and links to modification pages.

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

Add a New Campaign

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

Copy A Campaign

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

Modify Campaigns

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

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

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

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

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

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

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

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

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

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

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

campaign.

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

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

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

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

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

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

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

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

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

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

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

List Order - This menu is where you select how the leads that match the statuses selected above will be put in the lead hopper:

- DOWN: select the first leads loaded into the VICIdial_list table

- UP: select the last leads loaded into the VICIdial_list table
- UP PHONE: select the highest phone number and works its way down
- DOWN PHONE: select the lowest phone number and works its way up
- UP LAST NAME: starts with last names starting with Z and works its way down
- DOWN LAST NAME: starts with last names starting with A and works its way up
- UP COUNT: starts with most called leads and works its way down
- DOWN COUNT: starts with least called leads and works its way up
- DOWN COUNT 2nd NEW: starts with least called leads and works its way up inserting a NEW lead in every other lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 3rd 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 fourth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 5th NEW: starts with least called leads and works its way up inserting a NEW lead in every fifth lead. Must NOT have NEW selected in the dial statuses
- DOWN COUNT 6th NEW: starts with least called leads and works its way up inserting a NEW lead in every sixth lead. Must NOT have NEW selected in the dial statuses
- RANDOM: Randomly grabs lead within the statuses and lists defined
- UP LAST CALL TIME: Sorts by the newest local call time for the leads
- DOWN LAST CALL TIME: Sorts by the oldest local call time for the leads
- UP RANK: Starts with the highest rank and works its way down
- DOWN RANK: Starts with the lowest rank and works its way up
- UP OWNER: Starts with owners beginning with Z and works its way down
- DOWN OWNER: Starts with owners beginning with A and works its way up
- UP TIMEZONE: Starts with Eastern timezones and works West
- DOWN TIMEZONE: Starts with Western timezones and works East

List Order Randomize – When enabled, randomizes the order of the leads, after they have been placed in the Dial Hopper. Default is N for disabled.

NOTE, if you have a large number of leads this option may slow down the speed of the hopper loading script.

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

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

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

Drop Lockout Time - This is a number of hours that DROP abandon calls will be prevented from

being dialed, to disable set to 0. This setting is very useful in countries like the UK where there are regulations preventing the attempted calling of customers within 72 hours of an Abandon, or DROP. Default is 0.

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

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

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

Automatic Hopper Level - Setting this to Y will allow Vicidial to automatically adjust the hopper based off the settings in your campaign. The formula it uses to do this is:

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

Default is Y.

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

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

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

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

Dial Method - This field defines how dialing will take place. If MANUAL then the auto_dial_level will be locked at 0 unless Dial Method is changed. If RATIO then the normal dialing a number of lines for Active agents. If INBOUND_MAN then the auto_dial_level should be locked at 1 and no outbound automated calls will be placed. This dial method allows for agents to dial manually through a list while still being able to receive inbound phone calls. ADAPT_HARD_LIMIT will dial predictively up to the dropped percentage and then not allow aggressive dialing once the drop limit is reached until the percentage goes down again. ADAPT_TAPERED allows for running over the dropped percentage in the first half of the shift (as defined by call_time selected for campaign) and gets more strict as the shift

goes on. ADAPT_AVERAGE tries to maintain an average for the dropped percentage, but without imposing hard limits as aggressively as the other two methods. While in predictive dialing mode, The dial level can not be changed manually. The dialer automatically makes adjustments based on your settings. INBOUND_MAN allows the agent to place manual dial calls from a campaign list while being able to take inbound calls between manual dial calls.

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

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

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

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

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

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

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

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

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

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

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

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

Multiple Campaign Drop Rate Group - This feature allows you to set a campaign as a member of a Campaign Drop Rate Group, or a group of campaigns whose Human Answered calls and Drop calls for all campaigns in the group will be combined into a shared drop percentage, or abandon rate. This allows you to to run multiple campaigns at once and more easily control your drop rate. This is particularly useful in the UK where regulations permit this drop rate calculation method with campaign grouping for the same company even if there are several campaigns that company is running during the

same day. To enable this for a campaign, just select a group from the list. There are 10 groups defined in the system by default, you can contact your system administrator to add more. Default is DISABLED.

Inbound Queue No Dial - This feature if set to ENABLED allows you to prevent outbound auto-dialing of this campaign if there are any inbound calls waiting in queue that are part of the allowed inbound groups set in this campaign. Setting this to ALL_SERVERS will change the algorithm to calculate all inbound calls as active calls on this server even if they are on another server which will reduce the chance of placing unnecessary outbound calls if you have calls coming in on another server. Default is DISABLED.

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

Next Agent Call - This determines which agent receives the next call that is available:

- random: orders by the random update value in the VICIdial_live_agents table
- oldest_call_start: orders by the last time an agent was sent a call. Results in agents receiving about the same number of calls overall.
- oldest_call_finish: orders by the last time an agent finished a call. AKA agent waiting longest receives first call.
- overall_user_level: orders by the user_level of the agent as defined in the VICIdial_users table a higher user_level will receive more calls.
- campaign_rank: orders by the rank given to the agent for the campaign. Highest to Lowest.
- campaign_grade_random: orders based on the agent's User Grade for the campaign. The higher the agent's User Grade, the higher their probability to receive a call.
- fewest_calls: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- longest_wait_time: orders by the amount of time agent has been actively waiting for a call

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

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

rings).

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

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

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

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

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

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

- 8364 – same as 8368
- 8365 – Will send the call only to an agent on the same server as the call is on
- 8366 – Used for press-1 and survey campaigns
- 8367 – Will try to first send the call to an agent on the local server, then it will look on other servers
- 8368 – DEFAULT – Will send the call to the next available agent no matter what server they are on
- 8369 – Used for Answering Machine Detection after that, same behavior as 8368
- 8373 – Used for Answering Machine Detection after that same behavior as 8366-
- 8374 - Used for press-1, broadcast and survey campaigns with Cepstral Text-to-speech

- 8375 - Used for Answering Machine Detection then press-1, broadcast and survey campaigns with Cepstral Text-to-speech

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

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

Campaign Rec Filename - This field allows you to customize the name of the recording when Campaign recording is ONDEMAND or ALLCALLS. The allowed variables are CAMPAIGN CUSTPHONE FULLDATE TINYDATE EPOCH AGENT VENDORLEADCODE LEADID. The default is FULLDATE_AGENT and would look like this 20051020-103108_6666. Another example is CAMPAIGN_TINYDATE_CUSTPHONE which would look like this:

TESTCAMP_51020103108_3125551212.

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.

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

Agent Lead Search - Setting this option to ENABLED will allow agents to search for leads and view lead information while paused in the agent interface. Also, if the Agent User Group is allowed to view Call Logs then the agent will be able to view past call notes for any lead that they are viewing information on. Default is DISABLED.

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

GROUP_ in front will only search within leads that have the owner field matching the user group that the user is a member of, the options with TERRITORY_ in front will only search within leads that have the owner field matching the territories that the agent has selected.

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

Get Call Launch - This menu allows you to choose whether you want to auto-launch WEBFORM or WEBFORM2 pages in a separate window, auto-switch to the SCRIPT or FORM (custom fields) tabs, or do nothing (NONE) when a call is sent to the agent for this campaign.

Answering Machine Message - This field is for entering in an extension to blind transfer calls to when the agent gets an answering machine and clicks on the Answering Machine Message button in the transfer-conference frame. You or your system administrator must set this extension up in either the dialplan (extensions.conf), or as a file recording in the Audio Store (selected using the "audio chooser" link). Make sure it plays an audio file then hangs up.

Wait For Silence Options – This is used to determine when the customer's outgoing answering machine message has completed, so that VICIdial can correctly time when to leave the desired recorded message. There are two settings separated by a comma, the first option is how long to detect silence in milliseconds and the second option is for how many times to detect that before playing the message. Default is EMPTY for disabled. A standard value for this would be wait for 2 seconds of silence twice: 2000,2

AMD send to 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 determines that the call has encountered an answering machine.

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

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

Enable Transfer Presets - This transfer option will enable the Presets sub menu to appear at the top of the Campaign Modification page, where you can specify an almost unlimited list of transfer phone numbers. A "Presets" link appears at the bottom right corner of the agent's screen (in the same place

the D1-D5 buttons normally appear). When the agent clicks the link, it pops a window showing all their available preset phone numbers. Selecting the entry from the list places it in the “Number to Call” field in their Transfer-conference window. Default is DISABLED. CONTACTS is an option only if contact_information is enabled on your system, that is a custom feature.

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

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

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

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

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

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

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

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

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

CPD AMD Action - If you are using the Sangoma ParaXip Netborder Call Progress Detection

software then you will want to enable this setting. You can either select DISPO, which will disposition the call as (AA for Answering Machine or AFAX for Fax Machine) and hang it up if the call is being processed and has not been sent to an agent yet; or MESSAGE, which will send the call to the defined Answering Machine Message for this campaign. Default is DISABLED.

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

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

Scheduled Callbacks Alert - This option allows the callbacks status line in the agent interface to be red, blink or blink red when there are AGENTONLY scheduled callbacks that have hit their trigger time and date. Default is NONE for standard status line. The DEFER options will stop blinking and-or displaying in red when you check the callbacks, until the number of callbacks changes.

Scheduled Callbacks Count - This option allows you to set whether only LIVE callbacks, user-only scheduled callbacks that have hit their trigger date and time, or ALL_ACTIVE callbacks, user-only callbacks that are active in the system as well as LIVE callbacks, should be counted into the agent callback alert section on the agent screen. Default is ALL_ACTIVE.

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

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

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

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

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

Drop Call Action - This menu allows you to choose what happens to a call when it has been waiting for longer than what is set in the Drop Call Seconds field. HANGUP will simply hang up the call, AUDIO plays the Safe Harbor audio file, MESSAGE will send the call the Drop Exten that you have

defined below, VOICEMAIL will send the call to the voicemail box indicated below, CALLMENU will send the call to the Call Menu defined below, and IN_GROUP will send the call to the Inbound Group that is defined below.

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

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

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

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

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

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

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

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

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

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

Use Campaign DNC List - This defines whether this campaign is to filter leads against the DNC list that exists only for this campaign, and insert leads into the campaign-specific DNC list if they are dispositioned as DNC by an agent in this campaign. If it is set to Y, the hopper will look for each phone

number in the campaign-specific DNC list before placing it in the hopper. If it is in the campaign-specific DNC list then it will change that lead status to DNCC so it cannot be dialed. Default is N.

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

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

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

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

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

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

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

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

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

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

dial method must be set to MANUAL or INBOUND_MAN and No Hopper Dialing must be enabled. 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 Territories must be enabled in the System Settings.

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

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

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

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

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

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

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

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

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

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

Manual Dial List ID - The default list_id to be used when an agent places a manual call and a new

lead record is created in VICIdial_list. Default is 999. This field can contain digits only.

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

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

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

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

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

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

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

Agent Screen Extended Alt Dial - This feature allows for agents to access extended alternate phone

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

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

3-Way Call Dial Prefix - This defines what is used as the dial prefix for 3-way calls. Default is empty, so the campaign dial prefix is used. Placing 88 in this field, enables passthru to allow the agents to hear ringing(this only works with campaigns that use the standard dial prefix of “9”).

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

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

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

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

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

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

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

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

the phone number, **VENDOR**- This option will only search through the Vtiger vendors, **ACCTID**- This option works only for accounts and it will take the VICIdial vendor_lead_code field and try to search for the Vtiger account ID. If unsuccessful it will try any other methods listed that you have selected. Multiple options can be used for each search, but on large databases this is not recommended. Default is **LEAD**. **UNIFIED_CONTACT**- This option will use the beta Vtiger 5.1.0 feature to search by phone number and bring up a search page in Vtiger.

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

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

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

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

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

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

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

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

CRM Popup Address - The web address of a CRM login page, it can have variables populated just

like the web form address, with the VAR in the front and using --A--user_custom_one--B-- to define variables.

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

Dispo Call URL - This web URL address is not seen by the agent, but it is called every time a call is dispositioned by an agent if it is populated. Uses the same variables as the web form fields and scripts. dispo and talk_time are the variables you can use to retrieve the agent-defined disposition for the call and the actual talk time in seconds of the call. This URL can NOT be a relative path. Default is blank. NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. Or DROP calls could be sent to a list on list in another campaign, so that those customers can be given more care. The script can also be found in the Non-agent API document:

```
VARhttp://serverIP/agg/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1
```

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

No Agent Call URL - This web URL address is not seen by the agent, but if it is populated it is called every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. The variable "dispo" can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank.

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

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

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

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

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

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

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

Lists Within This Campaign

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

Dialable Leads and Leads in the Hopper

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

Campaign Ranks and Call Counts

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

Test Outbound Call

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

Campaign-Specific Custom Statuses

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

Campaign Hotkeys

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

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

Campaign Lead Recycling

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

Auto Alt-Number Dialing

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

NOTE: MULTI_LEAD Auto-Alt-Dial to use the Auto-Alt-Dial Statuses as set in the campaign automatically. If you are using MULTI_LEAD you may need to add statuses like DROP, PDROP and others to your campaign's auto-alt dial statuses so that the other leads tied by vendor_lead_code in the campaign's lists are not deactivated.

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.

AC-CID (Area Code Caller IDs)

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

Campaign Survey

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

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

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

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

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

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

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

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

Survey Method - This option defines what happens to a call after the customer has opted-in. AGENT_XFER will send the call to the next available agent. VOICEMAIL will send the call to the

voicemail box that is specified in the Voicemail field. EXTENSION will send the customer to the extension defined in the Survey Xfer Extension field. HANGUP will hang up the customer. CAMPREC_60_WAV will send the customer to have a recording made with their response, this recording will be placed in a folder named as the campaign inside of the Survey Campaign Recording Directory. CALLMENU sends the customer to the Call Menu indicated in the “Survey Call Menu” field below.

Survey No-Response Action - This 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 press 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.

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

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

Campaign List Mix

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

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

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

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

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

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

Logout All Agents From a Campaign

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

Delete Campaign

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

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

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.

[HOME](#) | [Timeclock](#) | [Logout](#) (6666)

Tuesday April 24, 2012 14:33:49 PM

[Users](#)
[Campaigns](#)
[Lists](#)
[Scripts](#)
[Filters](#)
[Inbound](#)
[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

Show Lists
 Add A New List
 Search For A Lead
 Add A New Lead
 Add-Delete DNC Number
 Load New Leads

VERSION: 2.4-364a
 BUILD: 120409-1136
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LIST LISTINGS:

LIST ID	LIST NAME	DESCRIPTION	RTIME	LEADS COUNT	ACTIVE	LAST CALL DATE	CAMPAIGN	MODIFY
999	Default inbound list			0	N		TESTCAMP	MODIFY
998	Default Manual list			0	N		TESTCAMP	MODIFY

Figure 5. VICdial Lists List

VICdial LISTS

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

Add a New List

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

Modify Lists

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Web Form & Web Form Two- These fields will override the respective fields on the attached campaign.

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

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

Time Zone Setting - This option allows you to set the method of maintaining the current time zone lookup for the leads within this list. This process is only done at night so any changes you make will not be immediate. COUNTRY_AND_AREA_CODE is the default, and will use the country code and

area code of the phone number to determine the time zone of the lead. `POSTAL_CODE` will use the postal code if available to determine the time zone of the lead. `NANPA_PREFIX` works only in the USA and will use the area code and prefix of the phone number to determine the time zone of the lead, but this is not enabled by default in the system, so please be sure you have the NANPA prefix data loaded onto your system before selecting this option. `OWNER_TIME_ZONE_CODE` will use the standard time zone abbreviation loaded into the owner field of the lead to determine the time zone, in the USA examples are AST, EST, CST, MST, PST, AKST, HST. This feature must be enabled by your system administrator to go into effect.

List Statistics

On the list modification page you will see 3 different set of statistics breaking down the types of leads inside of the list. The first set of stats is a simple breakdown of the disposition status of the leads in the list and how many of each disposition have been called and have not been called. The second set of stats is a breakdown of leads by timezone and whether they have been called or not. The third set of stats is a table that breaks down the leads into both their status and how many times they have been called.

Delete List

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

Search For a Lead

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

Add a New Lead

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

Modifying a Lead

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

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

VICIdial ADMINISTRATION

HOME | Timeclock | Logout (5666) Tuesday April 24, 2012 14:32:12 PM

ADD OR DELETE NUMBERS FROM THE DNC LIST

List: SYSTEM_INTERNAL - INTERNAL VICIDIAL DNC LIST

Phone Numbers:
(one phone number per line only)

Add or Delete: add

SUBMIT

Download numbers in this list to a file:
SYSTEM_INTERNAL - INTERNAL VICIDIAL DNC LIST

SUBMIT

VERSION: 2.4-364a
BUILD: 120409-1136
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Figure 6. Add a Number to the VICIdial DNC List

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

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

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

Figure 7. Super Lead Loader Main Screen

Download List

At the bottom of the list modification page is a link to download this list. In order to be able to do this you need to have the permission set in the User Modification page. Once you click on this link you will be presented with a “download file” window by your web browser. Simply save the file and open it in a spreadsheet program, text editor or database program to view the records. The file will contain all records in the list and all fields that are in the VICIdial_list table.

Loading New Leads

If your account has permissions for it, you can load leads into the VICIdial list through the web interface. You can get to the simple lead loader by clicking on the "LOAD NEW LEADS" link at the top of the LISTS section. The VICIdial web-based lead loader is designed simply to take a lead file - up to 8MB in size typically - that is either tab or pipe delimited and load it into the VICIdial_list table. The lead loader does not perform data validation (other than removing all non-digits from the phone number and alt_phone fields), so that is something you need to do before you load the leads. Also, make sure that you have created the list_id that these leads are to be under so that you can use them. To associate leads with a list you can either enter a list ID in every record of the file, or you can use the list ID override field on the lead loader page to assign the same list ID to every record in the file while it imports. If you would like the lead-loader to check for and remove duplicate records as it is loading, then select the “CHECK FOR DUPLICATES BY PHONE IN LIST ID” option in the Lead Duplicate Check menu. There are also options to check for duplicates by all of a specified campaign's lists as well as a system-wide duplication check. If you are loading leads for the USA and you have zip codes in your lead file, you have the option of selecting the “POSTAL CODE FIRST” option in the Lead Timezone Lookup menu. Using this option will give you more accurate time zone coding of your lead file than just using area code to determine timezone.

The leads will be timezone encoded when they are loaded and will be checked to see whether they are Daylight Savings Time(DST) for each lead or not. The timezone encoding is based upon the

phone_code, phone_number and state fields depending upon the phone code for each record and what country the leads are from, or optionally in the USA by zip code. For Australia(phone_code of 61) the state is used to figure out the timezone and DST scheme used for the lead. For the USA, Canada and the Caribbean(phone_code of 1) and for Mexico(phone_code of 52) the first 3 digits of the phone_number(otherwise known as the area code) are used to figure out the timezone for the lead, or optionally in the USA-only, by zip code. All other countries rely on the phone_code for proper timezone assignments. You need to make sure that you have a proper phone_code for each lead you are loading or timezone will be set to 0 or may possibly be set wrong. You will want to make sure that your Server Administrator has set the ADMIN_adjust_GMTnow_on_leads.pl script to be run every early morning so that the proper time restrictions will be updated if daylight savings time goes into effect.

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

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

There is also an option that allows for field choosing and TXT- Plain Text, CSV- Comma Separated Values and XLS or XLSX- Excel file formats. A tab-delimited or pipe delimited text file must end with “.txt”, a CSV(Comma Separated Values) file must end with “.csv” and an Excel file must end with “.xls” or “.xlsx”. It can also take both types (.sxc & .ods) of OpenOffice.org spreadsheet formats. To use the this option you will need to select your file and then select whether you want to use the standard format (mentioned above) or if you want to use the custom format. If you select the standard format, the file will be loaded in and you will see a status display of how many leads were loaded in. If you select the custom format you will need to select the fields from the file that you want to be placed into each of the VICIdial fields and then click submit to load the file in.

VICIdial Column	File data
VENDOR LEAD CODE:	"977854"
SOURCE ID:	(none)
PHONE NUMBER:	"7270000000"
TITLE:	"capt"
FIRST NAME:	"horonomer"
MIDDLE INITIAL:	"i"
LAST NAME:	"crunch"
ADDRESS1:	"123 seabreeze way"
ADDRESS2:	"Dock 34"
ADDRESS3:	"Pier 6"
CITY:	"san diego"
STATE:	"ca"
PROVINCE:	(none)
POSTAL CODE:	"87946"
COUNTRY CODE:	(none)
GENDER:	"m"
DATE OF BIRTH:	"1985-04-29"
ALT PHONE:	(none)
EMAIL:	(none)
SECURITY PHRASE:	(none)
COMMENTS:	(none)
RANK:	(none)
OWNER:	(none)

Figure 8. Super Lead Loader Field Chooser

List Custom Fields

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

Vicidial ADMINISTRATION

HOME | Timeslot | Logout (4444) Thursday April 26, 2012 16:34:16 PM

Modify Custom Fields: List ID 999 Records in this custom table: 0

SUMMARY OF FIELDS:

RANK	LABEL	NAME	TYPE	COST
1-1	car_color	Car Color	TEXT	33
TOTALS:		1		33

EXAMPLE OF CUSTOM FORM:

Car Color [help](#)

MODIFY EXISTING FIELDS:

Field Label 1: **car_color** ?

Field Rank 1: 1 ? Field Order: 1 ?

Field Name 1: Car Color ?

Field Name Position 1: LEFT ?

Field Description 1: Car Color ?

Field Help 1: Color of customers current daily vehicle. ?

Field Type 1: TEXT ?

Field Options 1: red, Red
green, Green
white, White
graphite, Graphite ?

Option Position 1: HORIZONTAL ?

Field Size 1: 4 ?

Field Max 1: 10 ?

Field Default 1: ?

Field Required 1: N ?

[DELETE THIS CUSTOM FIELD](#)

ADD A NEW CUSTOM FIELD FOR THIS LIST:

New Field Rank: 2 ? Field Order: 1 ?

Field Label: ?

Field Name: ?

Field Name Position: LEFT ?

Field Description: ?

Field Help: ?

Field Type: TEXT ?

Field Options: ?

Option Position: HORIZONTAL ?

Field Size: ?

Field Max: ?

Field Default: NULL ?

Field Required: NO ?

[Go to the list modification page for this list](#)

[Click here to see Admin changes to this lists custom fields](#)

runtime: 0 seconds Version: 2.4-16 Build: 120223-2315

Figure 9. Custom fields creation screen

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

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

Field Label: The lead table name for this field in the database. This can either be a brand-new field or default VICIdial field. If you choose to use a default VICIdial field, the name will appear in **red** once the field has been created. Examples of default fields are - *lead_id, vendor_lead_code, source_id, list_id, gmt_offset_now, called_since_last_reset, phone_code, phone_number, title, first_name, middle_initial, last_name, address1, address2, address3, city, state, province, postal_code, country_code, gender, date_of_birth, alt_phone, email, security_phrase, comments, called_count, last_local_call_time, rank, owner*

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

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

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

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

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

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

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

TEXT: a standard, single-line text entry box (mandatory additional field: Field Size, Field Max)

AREA: a standard, multi-line text entry box (mandatory additional fields: Field Size, Field Max)

SELECT: a single-selection pulldown menu (mandatory additional fields: Field Options)

MULTI: a box offering multiple selections (mandatory additional fields: Field Options, Field Size)

RADIO: a list of radio buttons, where only 1 option may be selected (mandatory additional field: Field Options, Option Position)

CHECKBOX: a list of checkboxes, where multiple options may be selected ((mandatory additional field: Field Options, Option Position)

DATE: a year month day calendar popup where the agent can select the date (mandatory additional fields: none)

TIME: a time selection box (mandatory additional fields: none)

DISPLAY: a display only field. This will not allow modification by the agent. This information would be on the lead when it was loaded. This type of field could also display information from a default

VICIdial field. (mandatory additional fields: Field Size, Field Max)

SCRIPT: A display only field. This field type can only use script variables just like in the Scripts feature. (mandatory additional fields: Field Size, Field Max)

HIDDEN: This field type will never be visible to the agent, but will allow the field to have data imported into it and exported from it, as well as have it available to the script tab and web form address. (mandatory additional fields: Field Max)

HIDEBLOB: similar to HIDDEN except the data storage type on the database is a BLOB type, suitable for binary data or data that needs to be secured. (mandatory additional fields: Field Max)

READONLY: a display only field, it will not allow modification by the agent. This differs from the DISPLAY field type because this field MUST have the Field Label identical to a default VICIdial field. The “Field Default” does not work on this type of field. (mandatory additional fields: Field Size, Field Max)

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

For example: electric_meter, Electric Meter
mortgage_rate, Mortgage Rate
income_level, Income Level

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

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

TEXT, AREA Fields: This determines the width of the text box, in characters, on the agent's screen.

MULTI Fields: This defines the number of options visible in the list.
(This is unused for the remaining Field Types)

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

TEXT, HIDDEN, READONLY Fields: This is the maximum number of characters allowed in the field.

AREA Fields: This is the number of rows tall the text box on the Agent's screen will be.
(This is unused for the remaining Field Types)

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

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

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

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

Field Cost: The cost of the customer field for this list, based on the size and complexity. The per field cost limit is 999, simply because the Field Cost indicator will not exceed 3 digits. When creating a field that large, we recommend using the AREA type since it maintains a very small fixed cost no

matter how much data is going to be entered into it. The maximum cost per list, for all Custom Fields, should never exceed 65,000.

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

Please Be Aware

-The following words CANNOT be used as field labels for Custom Fields:

accessible, action, add, all, alter, analyze, and, as, asc, asensitive, before, between, bigint, binary, bit, blob, both, by, call, cascade, case, change, char, character, check, collate, column, condition, constraint, continue, convert, create, cross, current_date, current_time, current_timestamp, current_user, cursor, database, databases, date, day_hour, day_microsecond, day_minute, day_second, dec, decimal, declare, default, delayed, delete, desc, describe, deterministic, distinct, distinctrow, div, double, drop, dual, each, else, elseif, enclosed, enum, escaped, exists, exit, explain, false, fetch, float, float4, float8, for, force, foreign, from, fulltext, grant, group, having, high_priority, hour_microsecond, hour_minute, hour_second, if, ignore, in, index, infile, inner, inout, insensitive, insert, int, int1, int2, int3, int4, int8, integer, interval, into, is, iterate, join, key, keys, kill, leading, leave, left, like, limit, linear, lines, load, localtime, localtimestamp, lock, long, longblob, longtext, loop, low_priority, master_ssl_verify_server_cert, match, mediumblob, mediumint, mediumtext, middleint, minute_microsecond, minute_second, mod, modifies, mysql, natural, no, no_write_to_binlog, not, null, numeric, on, optimize, option, optionally, or, order, out, outer, outfile, precision, primary, procedure, purge, range, read, read_only, read_write, reads, real, references, regexp, release, remove, rename, repeat, replace, require, restrict, return, revoke, right, rlike, schema, schemas, second_microsecond, select, sensitive, separator, set, show, smallint, spatial, specific, sql, sql_big_result, sql_calc_found_rows, sql_small_result, sqlexception, sqlstate, sqlwarning, ssl, starting, straight_join, table, terminated, text, then, time, timestamp, tinyblob, tinyint, tinytext, to, trailing, trigger, true, undo, union, unique, unlock, unsigned, update, usage, use, using, utc_date, utc_time, utc_timestamp, values, varbinary, varchar, varcharacter, varying, when, where, while, with, write, xor, year_month, zerofill

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

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

-We strongly recommend NOT using the following field labels:

lead_id, list_id, gmt_offset_now, called_since_last_reset, gender, comments, called_count, last_local_call_time, status, entry_date, entry_list_id, modify_date, user

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

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SCRIPTS LISTINGS:

SCRIPT ID	SCRIPT NAME	ACTIVE	ADMIN GROUP	MODIFY
CALNOTES	Call Notes and Appointment Setting	Y	---ALL---	MODIFY

Figure 10. VICIdial Scripts List

VICIdial SCRIPTS

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

Add a New Script

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

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

Modify Script

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

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

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

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

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

Script Text - This is where you place the content of a VICIdial Script. Minimum of 2 characters. In addition to being able to use basic HTML tags, you can have customer information be auto-populated in this script using "--A--field--B--" where field is one of the following field names: vendor_lead_code, source_id, list_id, gmt_offset_now, called_since_last_reset, phone_code, phone_number, title, first_name, middle_initial, last_name, address1, address2, address3, city, state, province, postal_code, country_code, gender, date_of_birth, alt_phone, email, security_phrase, comments. For example, this sentence would print the persons name in it:

Hello, can I speak with --A--first_name--B-- --A--last_name--B-- please? Well hello --A--title--B-- --A--last_name--B-- how are you today?

This would read----

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

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

```
<iframe src="http://astguiclient.sf.net/test_VICIdial_output.php?lead_id=--A--lead_id--B--&vendor_id=--A--vendor_lead_code--B--&list_id=--A--list_id--B--&gmt_offset_now=--A--gmt_offset_now--B--&phone_code=--A--phone_code--B--&phone_number=--A--phone_number--B--&title=--A--title--B--&first_name=--A--first_name--B--&middle_initial=--A--middle_initial--B--&last_name=--A--last_name--B--&address1=--A--address1--B--&address2=--A--address2--B--&address3=--A--address3--B--&city=--A--city--B--&state=--A--state--B--&province=--A--province--B--&postal_code=--A--postal_code--B--&country_code=--A--country_code--B--&gender=--A--gender--B--&date_of_birth=--A--date_of_birth--B--&alt_phone=--A--alt_phone--B--&email=--A--email--B--&security_phrase=--A--security_phrase--B--&comments=--A--comments--B--&user=--A--user--B--&campaign=--A--campaign--B--&phone_login=--A--phone_login--B--&fronter=--A--fronter--B--&closer=--A--user--B--&group=--A--group--B--&channel_group=--A--group--B--&SQLdate=--A--SQLdate--B--&epoch=--A--epoch--B--&uniqueid=--A--uniqueid--B--&customer_zap_channel=--A--customer_zap_channel--B--&server_ip=--A--server_ip--B--&SIPexten=--A--SIPexten--B--&session_id=--A--session_id--B--&phone=--A--phone--B--" style="width:460;height:290;background-color:transparent;" scrolling="auto" frameborder="0" allowtransparency="true" id="popupFrame" name="popupFrame" width="460" height="290"> </iframe>
```

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

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

Delete Script

If the option is enabled, a manager can go to the bottom of the script modification page and click on the

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

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LEAD FILTER LISTINGS:

FILTER ID	FILTER NAME	ADMIN GROUP	MODIFY
DROP72HOUR	UK 72 hour Drop No Call	---ALL---	MODIFY

VERSION: 2.4-364a

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Figure 11. VICdial Filters List

VICdial FILTERS

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

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

Add a New Filter

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

Modify Filter

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

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

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

Filter Name - This is a more descriptive name of the Filter. This is a short summary of the filter. max 30 characters, minimum of 2 characters.

Filter Comments - This is where you can place comments for a VICIdial Filter such as "calls all California leads". Maximum 255 characters, minimum of 2 characters.

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

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

```
called_count > 4 and called_count < 8
called_count IN('8','9','10','11')
state IN('NY','NJ')
```

Delete Filter

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

VICdial ADMINISTRATION

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INBOUND GROUP LISTINGS:

IN-GROUP	NAME	PRIORITY	ACTIVE	ADMIN GROUP	TIME	COLOR	MODIFY
AGENTDIRECT	Single Agent Direct Queue	99	Y	--ALL--	24 hours		MODIFY

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Figure 12. VICdial Inbound In-Groups List

VICdial INBOUND IN-GROUPS

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

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

Add a New In-Group

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

Copy An In-Group

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

Modify In-Group

(screen shot of Modify In-Group screen available in the Appendix)

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

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

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

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

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

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

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

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

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

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

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

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

- 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.

- `oldest_inbound_call_start`: orders by the last time an agent was sent an inbound call. Results in agents receiving about the same number of calls overall.
- `oldest_inbound_call_finish`: orders by the last time an agent finished an inbound call. AKA agent waiting longest receives first call.
- `overall_user_level`: orders by the `user_level` of the agent as defined in the `VICIdial_users` table a higher `user_level` will receive more calls.
- `inbound_group_rank`: orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
- `campaign_rank`: orders by the rank given to the agent for the campaign. Highest to Lowest.
- `ingroup_grade_random`: orders based on probability of the available agent's assigned grades for this ingroup.
- `campaign_grade_random`: orders based on probability of the available agent's assigned grades for this campaign.
- `fewest_calls`: orders by the number of calls received by an agent for that specific inbound group. Least calls first.
- `fewest_calls_campaign`: orders by the number of calls received by an agent for the campaign. Least calls first.
- `longest_wait_time`: orders by the amount of time agent has been actively waiting for a call.
- `ring_all`: rings all available agents until one picks up the phone.

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

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

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

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

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

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

Transfer-Conf DTMF - These seven fields allow for you to have two sets of Transfer Conference and DTMF presets and three additional number presets. When the call or campaign is loaded, the VICIdial Agent Screen will show five links on the transfer-conference frame("D1" through "D5") and auto-populate the number-to-dial and the send-dtmf fields when the links are clicked on. If you want to allow Blind transfers of customers to a VICIdial AGI script for logging or an IVR, then place AXFER

in the number-to-dial field. You can also specify an custom extension after the AXFER, for instance if you want to do Custom AGI IVR script you would put AXFER82904 in the number-to-dial field (assuming that _82904. is in your dialplan). Consultative transfers no longer need to use the CXFER prefix now that there is a CONSULTATIVE checkbox option on the Agent screen.

Timer Action - This feature allows you to trigger actions after a certain amount of time. the D1 and D2 DIAL options will launch a call to the Transfer Conference Number presets and send them to the agent session, this is usually used for simple IVR validation AGI applications or just to play a pre-recorded message. WEBFORM will open the web form address. MESSAGE_ONLY will simply display the message that is in the field below. NONE will disable this feature and is the default. This setting will override the Campaign settings. HANGUP will hang up the call when the timer is triggered, CALLMENU will send the call to the Call Menu specified in the Timer Action Destination field, EXTENSION will send the call to the Extension that is specified in the Timer Action Destination field, IN_GROUP will send the call to the In-Group specified in the Timer Action Destination field.

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

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

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

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

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

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

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

Call Time - This is the call time scheme to use for this inbound group. Keep in mind that the time is based on the server time. Default is 24hours. See the Call Times Admin section for more information.

Action Transfer CID - Used for Drop, After-hours and No-agent-no-queue actions. This is the caller ID number that the call uses before it is transferred to extensions, messages, voicemail or call menus. You can use CUSTOMER in this field to use the customer phone number, or CAMPAIGN to use the first allowed campaign caller id number. Default is CUSTOMER.

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

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

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

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

After Hours Transfer Group - If After Hours Action is set to IN_GROUP, the call will be sent to this inbound group if it enters the in-group outside of the call time scheme defined for the in-group.

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

No Agents No Queueing – Determines the call routing for an ingroup during normal business hours, if none of the agents have logged in to take calls. If set to N, the calls will queue up, waiting for agents to log in. If set to Y, it will follow the "No Agent No Queue Action" indicated below. If set to NO_PAUSED, it will route to the "No Agent No Queue Action" if agents are logged in, but in "Pause" status. Default is N.

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

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

Play Welcome Message - These settings select when to play the defined welcome message, ALWAYS will play it every time, NEVER will never play it, IF_WAIT_ONLY will only play the welcome message if the call does not immediately go to an agent, and YES_UNLESS_NODELAY will always play the welcome message unless the NO_DELAY setting is enabled. Default is ALWAYS.

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

On Hold Prompt Filename - The audio file located on the server to be played at a regular interval when the customer is on hold. Default is generic_hold. This audio file MUST be 9 seconds or less in length.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Wait Time Option Callmenu - If Wait Time Option is set to PRESS_CALLMENU, this is the Call Menu that the call will be sent to if the customer presses the option key when presented with the option.

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

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

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

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

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

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

Wait Time Option Callback List ID - If Wait Time Option is set to PRESS_CID_CALLBACK, this is the List ID the call is added to as a new lead if the customer presses the option key when presented with the option.

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

WAIT only.

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

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

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

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

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

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

Hold Time Option Callmenu - If Hold Time Option is set to CALL_MENU, this is the Call Menu that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

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

Hold Time Option Transfer In-Group - If Hold Time Option is set to IN_GROUP, this is the inbound group that the call will be sent to if the estimated hold time exceeds the Hold Time Option Seconds.

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

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

Hold Time Option Press Filename Seconds - This indicates the length of the Hold Time Option Message to VICIdial. This field should be set to the number of seconds that the Hold Time Option Press Filename plays for. Default is 10.

Hold Time Option After Press Filename - If Hold Time Option is set to one of the PRESS_ options or CALLERID_CALLBACK, this is the filename prompt that is played after the customer has pressed

1 or the call has been added to the callback list.

Hold Time Option Callback List ID - If Hold Time Option is set to CALLERID_CALLBACK, this is the List ID the call is added to as a new lead if the estimated hold time exceeds the Hold Time Option Seconds.

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

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

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

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

Hold Recall Transfer In-Group - If a customer calls back to this in-group more than once and this is not set to NONE, then the call will automatically be sent on to the In-Group selected in this field. Default is NONE.

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

In-Group Recording Override - This field allows for the overriding of the campaign call recording setting. This setting can be overridden by the VICIdial_user recording override setting. DISABLED will not override the campaign recording setting. NEVER will disable recording on the client. ONDEMAND is the default and allows the agent to start and stop recording as needed. ALLCALLS will start recording on the client whenever a call is sent to an agent. ALLFORCE will start recording on the client whenever a call is sent to an agent giving the agent no option to stop recording.

In-Group Recording Filename - This field will override the Campaign Recording Filenaming Scheme unless it is set to NONE. The allowed variables are CAMPAIGN CUSTPHONE FULLDATE TINYDATE EPOCH AGENT. The default is FULLDATE_AGENT and would look like this 20051020-103108_6666. Another example is CAMPAIGN_TINYDATE_CUSTPHONE which would look like this TESTCAMP_51020103108_3125551212. 50 char max. Default is NONE.

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

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

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

blank.

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

NOTE: Leads statused with a specific disposition can be moved to another list. For instance, SALE leads could be sent to another list, so that quality control could call them back after several days and ensure the product was delivered and working to their satisfaction. Or DROP calls could be sent to a list on list in another campaign, so that those customers can be given more care. The script can also be found in the Non-agent API document:

```
VARhttp://serverIP/agc/dispo_move_list.php?lead_id=--A--lead_id--B--&dispo=--A--dispo--B--&user=--A--user--B--&pass=--A--pass--B--&new_list_id=XXXXX&sale_status=SALE---SSALE---XSALE&reset_dialed=Y&log_to_file=1&new_list_id_1=XXXXX&sale_status_1=XFER&reset_dialed=Y_1&log_to_file_1=1
```

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

Add Lead URL - This web URL address is not seen by the agent, but it is called every time a lead is added to the system through the inbound process. Default is blank. You must begin this URL with VAR if you want to use variables, and of course `--A--` and `--B--` around the actual variable in the URL where you want to use it. Here is the list of variables that are available for this function. `lead_id`, `vendor_lead_code`, `list_id`, `phone_number`, `phone_code`, `did_id`, `did_extension`, `did_pattern`, `did_description`, `uniqueid`

No Agent Call URL - This web URL address is not seen by the agent, but if it is populated it is called every time a call that is not handled by an agent is hung up or transferred. Uses the same variables as the web form fields and scripts. `dispo` can be used to retrieve the system-defined disposition for the call. This URL can NOT be a relative path. Default is blank.

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

Extension Append CID - If enabled, the calls coming in from this in-group will have a space and the phone extension of the agent appended to the end of the CallerID name for the call before it is sent to the agent. Default is N for disabled.

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

prefix displayed to the first agent will also be displayed to the second agent.

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

Inbound Group Agent Rank, Grade, and Call Count

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

Inbound Group Report

Select the link “Click here to see a report for this inbound group” to view the Inbound Report. This report is identical to the Inbound report available on the reports page.

Logged in Agents Report

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

DIDs Using In-Group

Shows a list of all DIDs that may direct calls to this particular ingroup.

Call Menus Using This In-Group

Shows a list of all Call Menus that may direct calls to this particular ingroup.

Campaigns Using This In-Group

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

Delete In-Group

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

The screenshot shows the VICIdial Administration web interface. The top navigation bar includes links for HOME, Timeclock, and Logout (6666), along with the date and time: Tuesday April 24, 2012 15:15:30 PM. The left-hand navigation menu contains links for Users, Campaigns, Lists, Scripts, Filters, Inbound, User Groups, Remote Agents, Admin, and Reports. The Inbound section is expanded, showing links for Show In-Groups, Add A New In-Group, Copy In-Group, Show DIDs, Add A New DID, Copy DID, Show Call Menus, Add A New Call Menu, Copy Call Menu, Filter Phone Groups, Add Filter Phone Group, and Add-Delete FPG Number. The main content area displays the INBOUND DID LISTINGS table.

#	DID	DESCRIPTION	ACTIVE	ADMIN GROUP	ROUTE	RBC	MODIFY
2	1000	7275551234	Y	---ALL---	EXTEN	N	MODIFY
1	default	Default DID	Y	---ALL---	EXTEN	N	MODIFY

At the bottom of the page, the version information is displayed: VERSION: 2.4.3644, BUILD: 120409-1136, © 2012 Vicidial Group.

Figure 13. VICIdial DIDs

VICIdial INBOUND DIDS

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

Add a New DID

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

DIDs can be directed to:

- Extensions in any context in the dialplan (including Asterisk-based IVRs)
- A specific agent's user session
- Phones that are specified in the VICIdial interface
- VICIdial In-Groups
- VICIdial Call Menus
- Voicemail

Copy A DID

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

Modify DID

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

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

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

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

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

DID Route - This is the type of route that you set the DID to use. EXTEN will send calls to the extension entered below, VOICEMAIL will send calls directly to the voicemail box entered below, AGENT will send calls to a VICIdial agent if they are logged in, PHONE will send the call to a phone entry selected below, IN_GROUP will send calls directly to the specified inbound group. Default is EXTEN. CALLMENU will send the call to the defined Call Menu.

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

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

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

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

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

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

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

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

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

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

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

In-Group ID - If IN_GROUP is selected as the DID Route, then this is the In-Group that calls will be sent to.

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

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

In-Group List ID - If IN_GROUP is selected as the DID Route, then this is the List ID that leads may be searched through and that leads will be inserted into if necessary.

In-Group Campaign ID - If IN_GROUP is selected as the DID Route, then this is the Campaign ID that leads may be searched for in if the call handle method is CIDLOOKUPRC.

In-Group Phone Code - If IN_GROUP is selected as the DID Route, then this is the Phone Code used if a new lead is created.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Filter In-Group Phone Code - If the Filter Action is set to IN_GROUP, then this is the Phone Code used if a new lead is created.

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

Traffic Report

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

List of Recordings and Calls

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

Remote Agent Extension Overrides

This section allows you to enable DIDs to have extension overrides for remote agent routed calls through in-groups. The User Start must be a valid Remote Agent User Start or if you want the Extension Override entry to work for all calls then you can use ---ALL--- in the User Start field. If there are multiple entries for the same DID and User Start then the active entries will be used in a round robin method.

Delete DID

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

- Or simply hangup the call

Copy A Call Menu

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

Modify Call Menu

(screen shot of Modify Call Menu screen available in the Appendix)

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

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

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

Menu Prompt - This field contains the file name of the audio prompt to play at the beginning of this menu. You can enter multiple prompts in this field and the other prompt fields by separating them with a pipe character.

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

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

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

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

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

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

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

Tracking Group - This is the ID that you can use to track calls to this Call Menu when looking at the

IVR Report. The list includes CALLMENU as the default as well as all of the In-Groups.

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

Log Field - If the Log Key Press option is enabled, this allows the responses to also be stored in the indicated list field. *vendor_lead_code, source_id, phone_code, title, first_name, middle_initial, last_name, address1, address2, address3, city, state, province, postal_code, country_code, alt_phone, email, security_phrase, comments, rank, owner, status, user*. Default is NONE for disabled.

Option Value - This field is where you define the menu option, possible choices are: 0,1,2,3,4,5,6,7,8,9,*,#,A,B,C,D,TIMECHECK, TIMEOUT, and INVALIDs. The special option TIMECHECK can be used only if you have Menu Time Check enabled and there is a Call Time defined for the Menu. The TIMEOUT option would be where the call is routed if the caller does not make an entry in the time allotted. INVALID will allow you to set what happens when the caller enters an invalid option. INVALID_2ND and 3RD can only be active if INVALID is not used, it will wait until the second or third invalid entry by the caller before it executes the option. To delete an Option, just set the Route to REMOVE and the option will be deleted when you click the SUBMIT button.

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

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

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

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

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

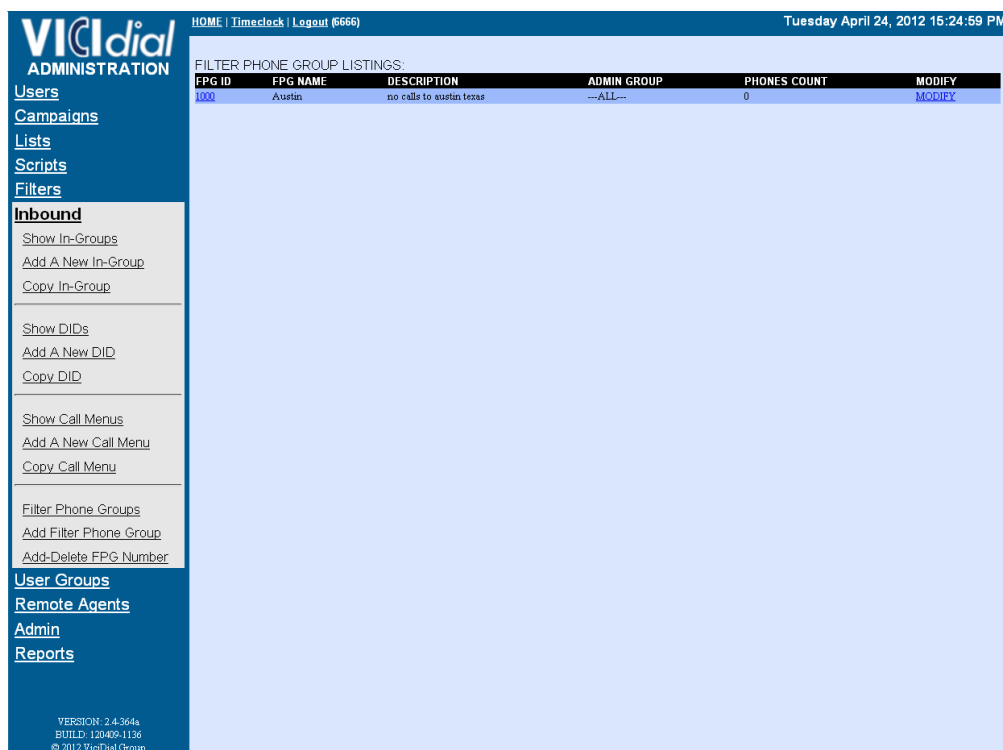


Figure 15. Filter Phone Groups

VICdial Filter Phone Groups

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

Add Filter Phone Group

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

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

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

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

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

Add-Delete FPG Number

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

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

- [Users](#)
- [Campaigns](#)
- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)**
 - [Show User Groups](#)
 - [Add A New User Group](#)
 - [Group Hourly Report](#)
 - [Bulk Group Change](#)
- [Remote Agents](#)
- [Admin](#)
- [Reports](#)

VERSION: 2.4.364a
 BUILD: 120409-1136
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HOME | [Timeclock](#) | [Logout](#) (6666)

Tuesday April 24, 2012 15:27:43 PM

USER GROUPS LISTINGS:

USER GROUP	GROUP NAME	FORCE TIMECLOCK	MODIFY
ADMIN	VICIDIAL ADMINISTRATORS	N	MODIFY
AGENTS	ALL AGENTS	N	MODIFY

Figure 16. VICIdial User Groups List

VICIdial USER GROUPS

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

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

Add a New User Group

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

Modify User Group

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

User Group - This is the short name of a VICIdial User group, try not to use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

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

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

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

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

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

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

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

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

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

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

Allowed Reports - If a user in this group is set to user level 7 or higher, then this feature can be used to restrict the reports that the users can view. Default is ALL. If you want to select more than one report then press the Ctrl key on your keyboard as you select the reports.

Webphone URL Override - This setting allows you to set an alternate webphone URL just for the members of one user group. Default is empty.

Webphone System Key Override - This setting allows you to set an alternate webphone System Key just for the members of one user group. Default is empty.

Webphone Dialpad Override - This setting allows you to activate or deactivate the dialpad on the

webphone just for the members of one user group. Default is DISABLED. TOGGLE will allow the user to view and hide the dialpad by clicking a link.

Allowed User Groups - This is a selectable list of User Groups to which members of this user group can view and possibly edit. User Groups can restrict access to almost all aspects of the system, from inbound DIDs to phones to voicemail boxes. The --ALL-- option allows the users in this group to see and log in to any record on the system if their user permissions allow for it.

Allowed Call Times - This is a selectable list of Call Times to which members of this user group can use in campaigns, in-groups and call menus. The --ALL-- option allows the users in this group to use all call times in the system.

Users Within This User Group – Displays the User ID, Full Name, User Level, and Active status of all agents assigned to the User group.

Add Or Remove In-Group Selected For Active Users In This User Group - Allows you assign or remove an In-Group from an entire User Group in one action. Otherwise In-Groups are assigned 1 agent at a time, in either the User or the In-Group modification page.

Delete User Group

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

Group Hourly Report

VICdial ADMINISTRATION

HOME | Timeclock | Logout (6666) Tuesday April 24, 2012 15:43:40 PM

Group Hourly Stats AGENTS

TSR HOUR COUNTS: [AGENTS](#) | [SALE](#) | 2012-04-24 15 | 2012-04-24

TSR	ID	SALE	TOTAL CALLS	SALE DAY	
300	Cyan Smith	0	0	0	MODIFY STATS
200	Betty Blue	0	0	0	MODIFY STATS
100	Asa Green	0	0	0	MODIFY STATS
TOTAL		SALE 0	0	0	

Please enter the group you want to get hourly stats for:

group:

status: (example: XFER)

date with hour: (example: 2004-06-25 14)

script runtime: 0 seconds

Figure 17. VICdial User Group, Group Hourly Report

You can get to the Group Hourly Report by clicking on the GROUP HOURLY link at the top of the USER GROUPS section. This will take you to the report screen where you need to select a user group, a disposition status you want a summary on, and the date and hour that you want those stats for. The results will appear in table form and will list the total calls taken by each agent in the group during that hour, the number of calls dispositioned with the status you defined in the form and how many calls of that status they dispositioned for the whole day. At the bottom of the table you will see totals for each of the tally columns as well as the form so that you can run another report if desired.

Bulk Group Change

If you need to change all of the members of one user group to another user group, you can use the Bulk Group Change page that is the last sub-menu option under the User Groups section.

There are two options on this page, change one user group to another, or change all non-ADMIN user group users to another user group.

- [Users](#)
- [Campaigns](#)
- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)
- [Remote Agents](#)**
 - [Show Remote Agents](#)
 - [Add New Remote Agents](#)
 - [Show Extension Groups](#)
 - [Add Extension Group](#)
- [Admin](#)
- [Reports](#)

VERSION: 2.4.364a
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HOME | [Timeclock](#) | [Logout](#) (6666)

Tuesday April 24, 2012 15:47:49 PM

REMOTE AGENTS ADDED: 100

REMOTE AGENTS LISTINGS:

USER	LINES	SERVER	CONF-EXTEN	GROUP	STATUS	CAMPAIGN	MODIFY
100	1	10.10.10.15	917275561111	NONE	INACTIVE	1000	MODIFY

Figure 18. VICIdial Remote Agents List

VICIdial REMOTE AGENTS

There are two recommended uses for Remote Agents in VICIdial. First, it is for inbound calls where an agent does not want to have to be connected to the session on the phone or cannot be at a computer screen to use the VICIdial client application. Second, remote agents accounts can be used to do outbound auto-dial message-playing campaigns. Setting up and running both of these scenarios are presented later on in this manual in the tutorials section. If you have an agent working in a remote location, they do NOT have to use the Remote Agent functionality in VICIdial, they can log in as a standard agent.

When you click on the REMOTE AGENTS link at the top of the Admin screen you will enter the Remote Agents section. This starts with a full listing of every VICIdial remote agent in the system with their Agent ID, number of lines, client server IP address, outgoing phone number for the agent, extension group, whether the remote agent is active, the campaign that the remote agent belongs to and a link to the remote agent modification page. We will first look at adding a new remote agent.

NOTE: The agent API allows for hangup and transfer of calls sent to a Remote Agent as well as setting call dispositions. For more information read the AGENT_API.txt doc.

NOTE: Remote Agents can be recorded, like any other. The Campaign Recording should be set to ALLFORCE, and recording should be enabled on their User page.

Add a New Remote Agent

You can get to the Add a Remote Agent screen by clicking on the "ADD NEW REMOTE AGENTS" link at the top of the REMOTE AGENTS section. When adding a new remote agent you must make sure that you set the user ID, number of lines and external extension as digits only or the submission

will not be accepted. Also, please make sure that the user ID matches a user ID from VICIdial. The way that multi-line remote agents works is that a new user is marked as logged in with an incremental number for the user starting at the user ID of the remote agent. For instance, if the user ID is given as 111 in the remote agent record and you define 3 lines for that agent, when the remote agent changes to ACTIVE there will be 3 accounts showing up as agents in the Real-time Campaign screen: R/111, R/112 and R/113 (you do NOT have to create a new VICIdial user record for each of these, just the first one). This is how multiple agents can be used with a single remote agent record, and this easily allows for multiple calls to be handled during auto-dial campaigns or in the case of a number being forwarded to a group of people on a hunt group of numbers on a traditional phone system. Because of this, you will want to make sure that the user IDs used for remote agents will not overlap with other VICIdial User IDs already in the system.

Modify Remote Agent

(screen shot of the Modify Remote Agent screen available in the Appendix)

It is important to remember that changing the status of a remote agent from ACTIVE to INACTIVE can take up to a minute to go into effect.

User ID Start - This is the starting User ID that is used when the remote agent entries are inserted into the system. If the Number of Lines is set higher than 1, this number is incremented by one until each line has an entry. Make sure you create a new VICIdial user account with a user level of 4 or greater if you want them to be able to use the Remote Agent login page (vdremote.php) for remote web access of this account. VICIdial validates that the Remote Agent is an active user in the system, and the lines set will not overlap those of another Remote Agent.

Number of Lines - This defines how many remote agent entries the system creates, and determines how many lines it thinks it can safely send to the number below.

Server IP - A remote agent entry is only good for one specific server, this field indicates which server the entry will use.

External Extension - This is the number that you want the calls forwarded to. Make sure that it is a full dialplan number and that if you need a 9 at the beginning you put it in here. Test this first by dialing this number from a phone on the dialer.

Extension Group - If set to something other than NONE or empty; this will override the External Extension field and use the Extension Group entries that have the same extension group ID. Default is NONE for deactivated.

Status - Here is where you turn the remote agent on and off. As soon as the agent is ACTIVE, the system assumes that it can send calls to it. It may take up to one minute once you change the status to INACTIVE to stop receiving calls.

Campaign - Here is where you select the campaign that these remote agents will be logged into. Inbound needs to use a CLOSER campaign and select the inbound campaigns below that you want it to receive calls from.

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

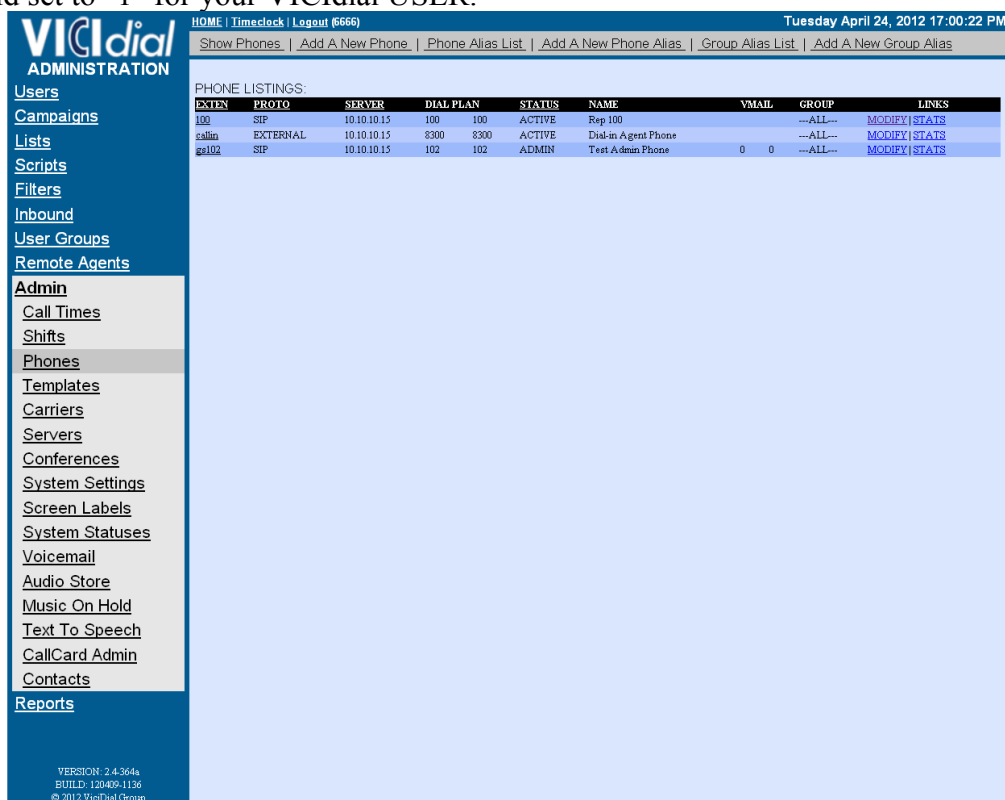
Delete Remote Agent

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

ADMIN – Advanced Administration

This next section covers a different Administrative section that you may not have access to, but it is important to know how to use if you need to set up EXTERNAL agents that would be using their own phones at home either through VOIP or their regular phone lines. Every VICIdial seat must have a phone entry in order to login to the VICIdial client. The exception to this is if you have the CALL-IN feature enabled on your VICIdial system that allows agents to dial into the VICIdial system instead of having the system call them when they log in. For more information on the CALL-IN feature see the notes at the bottom of the PHONE section below. Also covered are configuration or Music on Hold, Voicemail boxes, the Audio Store and several other system configuration options.

When you click on the “Admin” link at the top of the Admin screen you will enter the Higher-level VICIdial Admin section. This contains the second sub-section which has the Phones sub-section with a full listing of every VICIdial phone record in the system with their phone extension, protocol, server, IP, Dial Plan extension, status, phone name, voicemail message count, Admin User Groups, and a link to the phone modification page. We will first look at adding a new phone. If you would like to be able to delete a phone record, you must use a VICIdial USER record and you must have the "AGC Delete Phones" field set to "1" for your VICIdial USER.



The screenshot shows the VICIdial Administration interface. On the left is a navigation menu with links: Users, Campaigns, Lists, Scripts, Filters, Inbound, User Groups, Remote Agents, Admin (highlighted), Call Times, Shifts, Phones (highlighted), Templates, Carriers, Servers, Conferences, System Settings, Screen Labels, System Statuses, Voicemail, Audio Store, Music On Hold, Text To Speech, CallCard Admin, Contacts, and Reports. At the bottom of the menu, it says 'VERSION: 2.4.364s, BUILD: 120499-1136, © 2012 Vicidial Group'. The main content area has a header with 'HOME | Timeclock | Logout (6666)' and 'Tuesday April 24, 2012 17:00:22 PM'. Below the header are links: 'Show Phones', 'Add A New Phone', 'Phone Alias List', 'Add A New Phone Alias', 'Group Alias List', and 'Add A New Group Alias'. The 'PHONE LISTINGS:' section contains a table with the following data:

EXTEN	PROTO	SERVER	DIAL PLAN	STATUS	NAME	VMAIL	GROUP	LINKS
102	SIP	10.10.10.15	100 100	ACTIVE	Rep 100		--ALL--	MODIFY STATS
callin	EXTERNAL	10.10.10.15	8300 8300	ACTIVE	Dial-in Agent Phone		--ALL--	MODIFY STATS
gs102	SIP	10.10.10.15	102 102	ADMIN	Test Admin Phone	0 0	--ALL--	MODIFY STATS

Figure 19. Admin Phones List

ADMIN - PHONES

Add a New Phone

You can get to the Add Phone screen by clicking on the "ADD A NEW PHONE" link at the top of the

admin page. The add a phone screen has the first 17 fields that are needed to have a valid phone record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new phone you must make sure that you set the extension, dialplan number, server_ip, login, password, full name, protocol and local GMT, or the submission will not be accepted. Also, please make sure that the extension you have chosen does not have any spaces or special punctuation, only letters, numbers and dashes. If you are setting up a channelbank (Zap or DAHDI protocol) phone then you need to make sure that your system administrator has set up the account on the system before you set up the phone account. SIP and IAX protocol phones will have their Asterisk settings created automatically within one minute of submitting the form. EXTERNAL protocol phone entries do not require any Asterisk configuration because they use the dialplan to place calls out.

NOTE: For SIP and IAX phones, the registration password that you will use is set in the “Registration Password” field, not the “Login Password” field. These are often confused.

Modify Phones

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

From the LIST ALL PHONES screen you can click on the MODIFY link for any phone entry to modify it's record.

Phone extension - This field is where you put the phone's name as it appears to Asterisk, not including the protocol or slash at the beginning. For Example: for the SIP phone SIP/test101 the Phone extension would be test101. Also, for IAX2 phones: IAX2/IAXphone1@IAXphone1 would be IAXphone1 with a protocol of IAX2. For Zap agent phones(channelbank phones) make sure you put the full channel: Zap/25-1 would be 25-1. Another note, make sure you set the Protocol below correctly for your type of phone(Zap/IAX2/SIP/EXTERNAL).

Dial Plan number - This field is for the number you dial to have the phone ring. This number is defined in the extensions.conf file of your Asterisk server

Voicemail Box - This field is for the voicemail box that the messages go to for the user of this phone. We use this to check for voicemail messages and for the user to be able to use the VOICEMAIL button on the Agent interface.

Outbound CallerID - This field is where you would enter the caller ID number that you would like to appear on outbound calls placed from the astguiclient web-client. Although, once the agent logs into a campaign, the “Campaign Call ID” will override this setting. This does not work on RBS, non-PRI, T1/E1s or POTS telephone lines.

Admin User Group - This is the administrative user group for this Phone extension, this allows admin viewing of this to be restricted by user group. Default is --ALL-- which allows any admin user to view this particular Phone extension.

Phone IP address - This field is for the phone's IP address if it is a VOIP phone. This is an optional field

Computer IP address - This field is for the user's computer IP address. This is an optional field

Server IP - This menu is where you select which server the phone is active on.

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

Login Password - The password used for the phone user to login to the web-based client applications. IMPORTANT, this is the password only for the agent web interface phone login, to change the sip.conf or iax.conf password, or secret, for this phone device you need to modify the Registration Password in the next field.

Registration Password - This is the secret, or password, for the phone in the iax or sip auto-generated conf file for this phone. Limit is 20 characters alphanumeric, dash, and underscore accepted. Default is test. Formerly called “Conf File Secret”. A strong registration password should be at least 8 characters in length and have lower case and upper case letters as well as at least one number.

Set As Webphone - Setting this option to Y will attempt to load a web-based phone when the agent logs into their agent screen. Default is N.

Webphone Dialpad - This setting allows you to activate or deactivate the dialpad for this webphone. Default is Y for enabled. TOGGLE will allow the user to view and hide the dialpad by clicking a link. This feature is not available on all webphone versions.

Use External Server IP - If using as a web phone, you can set this to Y to use the servers External IP to register to instead of the Server IP. Default is empty.

Status - The status of the phone in the system, ACTIVE and ADMIN allow for GUI clients to work. ADMIN allows access to this administrative web site. All other statuses do not allow GUI client or Admin web access.

Active Account - Whether the phone is active to put it in the list in the GUI client.

Phone Type - Purely for administrative notes.

Full Name - Used by the GUIclient in the list of active phones.

Email - An email account that is associated with this phone entry

Delete Voicemail After Email - This optional setting allows you to have the voicemail messages deleted from the system after they have been emailed out. Default is N.

Voicemail Zone - This setting allows you to set the local timezone for this voicemail box. This is useful when the agent using the voicemail is not in the same time zone the dialers are set to. Default is set in the System Settings.

Voicemail Options - This optional setting allows you to define additional voicemail settings. It is recommended that you leave this blank unless you know what you are doing.

Company - Purely for administrative notes.

Picture - Not yet Implemented.

New Messages - Number of new voicemail messages for this phone on the Asterisk server.

Old Messages - Number of old voicemail messages for this phone on the Asterisk server.

Client Protocol - The protocol that the phone uses to connect to the Asterisk server: SIP, IAX2, Zap. Also, there is EXTERNAL for remote dial numbers or speed dial numbers that you want to list as phones.

Local GMT - The difference from Greenwich Mean time, or ZULU time where the phone is located. DO NOT ADJUST FOR DAYLIGHT SAVINGS TIME. This is used by the VICIdial campaign to accurately display the time and customer time.

Phone Ring Timeout - This is the amount of time, in seconds, that the phone will ring in the dialplan before sending the call to voicemail. Default is 60 seconds.

On-Hook Agent Login - This option is only used for inbound calls going to an agent logged in with this phone. This feature will call the agent and will not send the customer to the agents session until the line is answered. Default is N for disabled.

Manager Login - This is the login that the GUI clients for this phone will use to access the Database where the server data resides. NOT USED ANYMORE.

Manager Secret - This is the password that the GUI clients for this phone will use to access the Database where the server data resides. NOT USED ANYMORE.

VICIdial Default User - This field places a default value in the VICIdial user field whenever this phone user opens the VICIdial client application. Leave blank for no user.

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

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

Park Exten - This is the default Parking extension for the client applications. Verify that a different one works before making any changes.

Conf Exten - This is the default Conference park extension for the client applications. Verify that a different one works before making any changes.

VICIdial Park Exten - This is the default Parking extension for VICIdial client applications. Verify that a different one works before making any changes.

VICIdial Park File - This is the default VICIdial park extension file name for the client applications. Verify that a different one works before making any changes. limited to 10 characters.

Monitor Prefix - This is the dialplan prefix for monitoring of Zap channels automatically within the astGUIClient app. Only change according to the extensions.conf ZapBarge extensions records.

Recording Exten - This is the dialplan extension for the recording extension that is used to drop into meetme conferences to record them. It usually lasts up to one hour if not stopped. verify with extensions.conf file before changing.

VMAIL Main Exten - This is the dialplan extension going to check your voicemail. verify with extensions.conf file before changing.

VMAIL Dump Exten - This is the dialplan prefix used to send calls directly to a user's voicemail from a live call in the astGUIClient application. verify with extensions.conf file before changing.

Exten Context - This is the dialplan context that this phone primarily uses. It is assumed that all numbers dialed by the client applications are using this context so it is a good idea to make sure this is the most wide context possible. Verify with extensions.conf file before changing.

Phone Context - The dial plan context this phone will use to dial out. If you are running a call center and you do not want your agents to be able to dial out outside of the VICIdial application for example, then you would set this field to a dialplan context that does not exist, something like agent-nodial. default is default.

Allowed Codecs - You can define a comma delimited list of codecs to be set as the default codecs for this phone. Options for codecs include ulaw, alaw, gsm, g729, speex, g722, g723, g726, ilbc, ... Some of these codecs might not be available on your system, like g729 or g726. If the field is empty, then the system default codecs or the phone entry above this one will be used for the allowable codecs. Default is empty.

Allowed Codecs With Template- Setting this option to 1 will include the codecs defined above, even if a conf file template is used. Default is 0.

DTMF send Channel - This is the channel string used to send DTMF sounds into meetme conferences from the client applications. Verify the exten and context with the extensions.conf file.

Outbound Call Group - This is the channel group that outbound calls from this phone are placed out of. There are a couple routines in the client applications that use this. For Zap channels you want to use something like Zap/g2 , for IAX2 trunks you would want to use the full IAX prefix like IAX2/VICItst1:secret@10.10.10.15:4569. Verify the trunks with the extensions.conf file, it is usually what you have defined as the TRUNK global variable at the top of the file. For most VICIdial installations you will not need to set this field.

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

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

Call Logging - This is set to true if the call_log.agi file is in place in the extensions.conf file for all outbound and hangup 'h' extensions to log all calls. This should always be 1 because it is mandatory for many astGUIClient and VICIdial features to work properly. NOT USED ANYMORE.

User Switching - Set to true to allow user to switch to another user account. NOTE: If user switches they can initiate recording on the new user's phone conversation.

Conferencing - Set to true to allow user to start conference calls. Only used for the agent's web-client application.

Admin Hangup - Set to true to allow user to be able to hangup any line at will through astGUIClient. Good idea only to enable this for Admin users. Only used for the astguiclient web-client application.

Admin Hijack - Set to true to allow user to be able to grab and redirect to their extension any line at will through astGUIClient. Good idea only to enable this for Admin users. But is very useful for Managers. Only used for the astguiclient web-client application.

Admin Monitor - Set to true to allow user to be able to grab and redirect to their extension any line at will through astGUIClient. Good idea only to enable this for Admin users. But is very useful for Managers and as a training tool. Only used for the astguiclient web-client application.

Call Park - Set to true to allow user to be able to park calls on astGUIClient hold to be picked up by any other astGUIClient user on the system. Calls stay on hold for up to a half hour then hangup. Usually enabled for all. Only used for the astguiclient web-client application.

Updater Check - Set to true to display a popup warning that the updater time has not changed in 20 seconds. Useful for Admin users. NOT USED ANYMORE.

AF Logging - Set to true to log many actions of astGUIClient usage to a text file on the user's computer. NOT USED ANYMORE.

Queue Enabled - Set to true to have client applications use the Asterisk Central Queue system. Required for VICIdial and recommended for all users. NOT USED ANYMORE.

CallerID Popup - Set to true to allow for numbers defined in the extensions.conf file to send CallerID pop-up screens to astGUIClient web-client users.

VMail Button - Set to true to display the VOICEMAIL button and the messages count display on astGUIClient web-client.

Fast Refresh - Set to true to enable a new rate of refresh of call information for the astGUIClient. Default disabled rate is 1000 ms ,1 second. Can increase system load if you lower this number. Only used for the astguiclient web-client application.

Fast Refresh Rate - in milliseconds. Only used if Fast Refresh is enabled. Default disabled rate is 1000 ms ,1 second. Can increase system load if you lower this number. Only used for the agent's web-client application.

Persistent MySQL - If enabled the astGUIclient connection will remain connected instead of connecting every second. Useful if you have a fast refresh rate set. It will increase the number of connections on your MySQL machine. NOT USED ANYMORE.

Auto Dial Next Number - If enabled the VICIdial client will dial the next number on the list automatically upon disposition of a call unless they selected to "Stop Dialing" on the disposition screen. NOT USED ANYMORE.

Stop Rec after each call - If enabled the VICIdial client will stop whatever recording is going on after each call has been dispositioned. Useful if you are doing a lot of recording or you are using a web form to trigger recording.

Enable SIPSAK Messages - If enabled the server will send messages to the SIP phone to display on the phone LCD display when logged into VICIdial. Feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

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

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

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

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

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

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

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

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

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

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

Template ID - This is the optional conf file template ID that this phone entry will use for its Asterisk settings. Default is --NONE-- or blank.

Conf Override Settings - If populated, and the Template ID is set to --NONE-- then the contents of this field are used as the conf file entries for this phone. generate_VICIdial_conf for this phones server must be set to Y for this to work. This field should NOT contain the [extension] line, that will be

automatically generated.

Call-In phone entry, dial-in VICIdial agents

The Call-In feature allows agents to dial into the VICIdial system instead of having the system call them when they log in. With this feature you only need one phone entry for all agents dialing in on a single server. Every agent would use the same phone login(callin) when they log in to the VICIdial.php agent interface. When the agent dials in the phone number that your administrator has set up for call-in capability, the agent will need to enter their user ID and password. For agents that will be calling in to VICIdial this way they will need to have VICIdial user IDs and passwords that are only made up of digits, no letters or special characters.

Phone Stats

This report shows totals for this phone in channel, group, call count, and time; displayed for 1 or several days. This also shows individual records for the last 1000 calls placed in the date range indicated.

Phone Call Recordings

This links directly to the User Stats report for the agent using the phone during the time period queried. This includes their call stats & recordings.

Delete Phone

If the option is enabled, a manager can go to the bottom of the phone modification page and click on the "DELETE THIS PHONE" link to remove a phone entry from the system. This is a two-step process to prevent accidental deletion. Once the link is clicked on, the page will load again with a confirmation link at the top of the screen. You must click on the second "DELETE THIS PHONE" link to remove the phone from the system. This only works when you login to the VICIdial admin pages using your VICIdial USER account that has permissions to delete phone entries.

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

[Show Phones](#) | [Add A New Phone](#) | [Phone Alias List](#) | [Add A New Phone Alias](#) | [Group Alias List](#) | [Add A New Group Alias](#)

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[Voicemail](#)
[Audio Store](#)
[Music On Hold](#)
[Text To Speech](#)
[CallCard Admin](#)
[Contacts](#)

[Reports](#)

VERSION: 2.4-364a

BUILD: 120409-1136

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Tuesday April 24, 2012 17:22:21 PM

PHONE ALIAS LISTINGS:

ALIAS ID	ALIAS NAME	PHONE LOGINS LIST	GROUP	MODIFY
testalias	Test Alias	callings102	ADMIN	MODIFY

Figure 20. Phone Alias

ADMIN – PHONE ALIAS

On multi-server systems where you are using SIP or IAX phones that are able to register to multiple servers at the same time, you may want to use Phone Aliases. They allow you to balance the number of agents logged into each server across all servers as the agents log in. If a server fails and changes to Active=N then the agents that were on that server can simply log out and back in using their phone alias login and they will be using another server.

Here is the listing of fields in the Phone Alias screen:

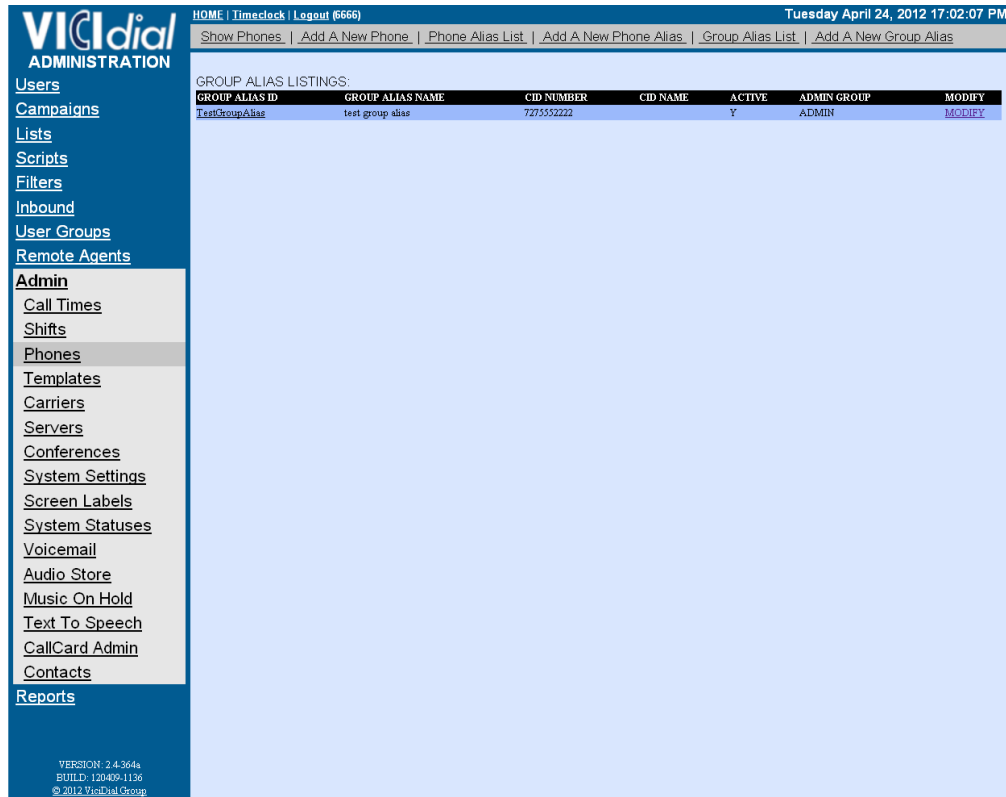
Alias ID - The ID of the alias used to allow for phone load balanced logins. no spaces or other special characters allowed. Must be between 2 and 20 characters in length.

Alias Name - The name used to describe a phones alias, Must be between 2 and 50 characters in length.

Phones Logins List - The comma separated list of phone logins used when an agent logs in using

phone load balanced logins. The Agent application will find the active server with the fewest agents logged into it and place a call from that server to the agent upon login.

At the bottom of this screen you will see the details on the phones that are set up in this Phone Alias with links to go to those phones entries.



The screenshot shows the VICIdial Administration web interface. On the left is a navigation menu with links for Users, Campaigns, Lists, Scripts, Filters, Inbound, User Groups, Remote Agents, Admin (with sub-links for Call Times, Shifts, Phones, Templates, Carriers, Servers, Conferences, System Settings, Screen Labels, System Statuses, Voicemail, Audio Store, Music On Hold, Text To Speech, CallCard Admin, and Contacts), and Reports. The main content area is titled 'GROUP ALIAS LISTINGS:' and contains a table with the following data:

GROUP ALIAS ID	GROUP ALIAS NAME	CID NUMBER	CID NAME	ACTIVE	ADMIN GROUP	MODIFY
TestGroupAlias	test group alias	7275552222		Y	ADMIN	MODIFY

At the bottom left of the interface, the version information is displayed: VERSION: 2.4.364a, BUILD: 120409-1136, © 2012 Vicidial Group.

Figure 21. Group Alias

GROUP ALIAS

Group Aliases are an optional feature that allows agents to select an outbound callerID to send manual calls out as. This feature also works for three-way calls.

Group Alias ID - The ID of the group alias used by agents to dial out calls from the VICIdial agent interface with different Caller IDs. no spaces or other special characters allowed. Must be between 2 and 20 characters in length.

Group Alias Name - The name used to describe a group alias, Must be between 2 and 50 characters in length.

Admin User Group - This is the administrative user group for this Group Alias record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Group Alias record.

Caller ID Number - The Caller ID number used in this Group Alias. Must be digits only.

Caller ID Name - The Caller ID name that can be sent out with this Group Alias. As far as we know

this will only work in Canada on PRI circuits and using an IAX loop trunk through Asterisk. In the USA as in most of the rest of the world there is a separate lookup process for getting the CIDname for a call, while in Canada this is not the case and the CIDname is sent along with the call as it is done with CIDnumber in the rest of the world.

VICdial ADMINISTRATION Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin Call Times Shifts Phones Templates Carriers Servers Conferences System Settings Screen Labels System Statuses Voicemail Audio Store Music On Hold Text To Speech CallCard Admin Contacts Reports	HOME Timesclock Logout (6666)		Tuesday April 24, 2012 17:02:51 PM				
	Show Call Times Add A New Call Time Show State Call Times Add A New State Call Time						
CALL TIME LISTINGS:							
CALLTIME ID	CALLTIME NAME	DEFAULT START	DEFAULT STOP	ADMIN GROUP	MODIFY		
12pm-2pm	default 12pm to 2pm calling	1200	1700	--ALL--	MODIFY		
12pm-5pm	default 12pm to 5pm calling	1200	1200	--ALL--	MODIFY		
24hours	default 24 hours calling	0	2400	--ALL--	MODIFY		
5pm-9pm	default 5pm to 9pm calling	1700	2100	--ALL--	MODIFY		
9am-5pm	default 9am to 5pm calling	900	1700	--ALL--	MODIFY		
9am-9pm	default 9am to 9pm calling	900	2100	--ALL--	MODIFY		

Figure 22. VICdial Call Times List

ADMIN - VICdial CALL TIMES

Call Time definitions are the limits that you place on the days and times that you call customers, or in the case of In-Groups, the days and times that you will receive calls from customers. These are currently definable by day of the week down to hours and minutes. There is also a method for creating special rules to override these call time definitions by state (province). These times are defined by local customer time, not by the time where your agents or your dialer are located, except in the case of In-Groups where the time defined is for the local server time.

When you click on the CALL TIMES link in the Admin section, you will enter the Call Times subsection. This starts with a full listing of every call time definition in the system with its call time ID, name, the default start and stop time, admin group, and a link to the call time modification page. We will first look at adding a new call time.

Add a New Call Time Definition

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

Modify a Call Time Definition

(screen shot of the Modify Call Time screen available in the Appendix)

At the bottom of the Call Time modification page you will see a list of campaigns currently using that call time definition that you can click on to go to each campaign modification page.

Call Time ID - This is the short name of a VICIdial Call Time Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field (it will support dashes). max 10 characters, minimum of 2 characters.

Call Time Name - This is a more descriptive name of the Call Time Definition. This is a short summary of the Call Time definition. max 30 characters, minimum of 2 characters.

Call Time Comments - This is where you can place comments for a VICIdial Call Time Definition such as "10am to 4pm with extra call state restrictions". max 255 characters.

Admin User Group - This is the administrative user group for this Call Time record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Call Time record.

Default Start and Stop Times - This is the default time that calling will be allowed to be started or stopped within this call time definition if the day-of-the-week start time is not defined. 0 is midnight. To prevent calling completely, set this field to 2400 and set the Default Stop time to 2400. To allow calling 24 hours a day, set the start time to 0 and the stop time to 2400. For inbound only, you can also set the stop call time higher than 2400 if you want the call time to go beyond midnight. So if you want your call time to run from 6 am until 2 am the next day, you would put 0600 as the start time and 2600 as the stop time.

Weekday Start and Stop Times - These are the custom times per day that can be set for the call time definition. Same rules apply as with the Default start and stop times.

AH Override – Audio files placed in this field will override the the After Hours message for for any Ingroups assigned this Call Time. Default is empty.

State Call Time Definitions - This is the list of State specific call time definitions that are followed in this Call Time Definition. State Call Time Definitions, if selected in a call time definition, will override any call time settings for the state that is set in the state call time definition. To add an existing state call time definition to a call-time record, simply select the state record you want to add and click submit. It will then appear in the listing of state call time records being followed for this call time definition.

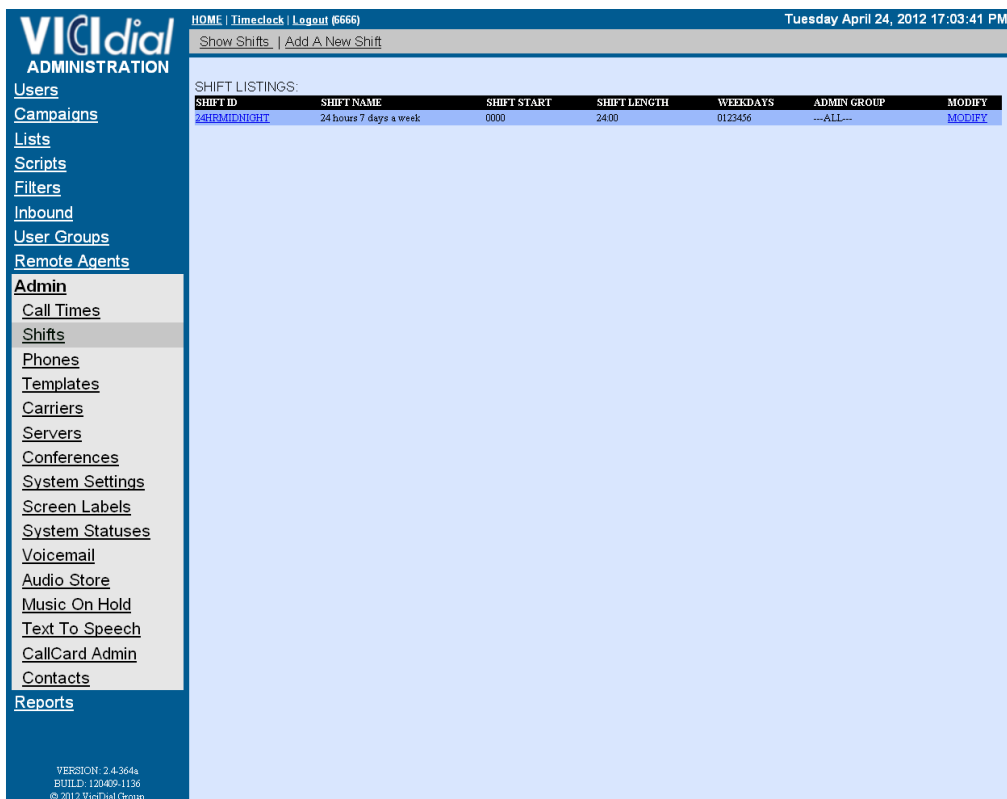
State Call Time State - This is the two letter code for the state that this calling time definition is for. For this to be in effect the local call time that is set in the campaign must have this state call time record in it as well as all of the leads having two letter state codes in them.

State-specific Call Time Definitions

The state-specific call time definitions are available from the CALL TIMES section by clicking on the "SHOW STATE CALL TIMES" link to display all of the state call times, or the "ADD NEW STATE CALL TIME" link to add new state specific call times. State-specific definitions function just like Call Time definitions except that they are restricted to one state(or province/territory) and multiple state-specific call times can be assigned to one or many call time definitions. State-specific call time definitions only work if you have the "state" field populated in the lists that you load into the dialer.

Delete Call Times

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



The screenshot shows the VICIdial Administration interface. The sidebar on the left contains navigation links for Users, Campaigns, Lists, Scripts, Filters, Inbound, User Groups, Remote Agents, Admin, Call Times, Shifts, Phones, Templates, Carriers, Servers, Conferences, System Settings, Screen Labels, System Statuses, Voicemail, Audio Store, Music On Hold, Text To Speech, CallCard Admin, Contacts, and Reports. The main content area displays the 'SHIFT LISTINGS' table.

SHIFT ID	SHIFT NAME	SHIFT START	SHIFT LENGTH	WEEKDAYS	ADMIN GROUP	MODIFY
24HOURMIDNIGHT	24 hours 7 days a week	0000	2400	0123456	---ALL---	MODIFY

At the bottom of the sidebar, the version information is displayed: VERSION: 2.4.364a, BUILD: 120409-1136, © 2012 Vicidial Group.

Figure 23. VICIdial Shifts

Shifts

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

Shift ID - This is the short name of a VICIdial Shift Definition. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 20 characters, minimum of 2 characters.

Shift Name - This is a more descriptive name of the Shift Definition. This is a short summary of the Shift definition. max 50 characters, minimum of 2 characters.

Admin User Group - This is the administrative user group for this Shift record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Shift record.

Shift Start Time - This is the time that the campaign shift begins. Must only be numbers, 9:30 AM would be 0930 and 5:00 PM would be 1700.

Shift Length - This is the time in Hours and Minutes that the campaign shift lasts. 8 hours would be 08:00 and 7 hours and 30 minutes would be 07:30.

Shift Weekdays - In this section you should choose the days of the week that this shift is active.

VICIdial ADMINISTRATION							
HOME Timeclock Logout (6666) Tuesday April 24, 2012 17:04:22 PM							
Show Servers Add A New Server							
Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin Call Times Shifts Phones Templates Carriers Servers Conferences System Settings Screen Labels System Statuses Voicemail Audio Store Music On Hold Text To Speech CallCard Admin Contacts Reports							
SERVER LISTINGS:							
SERVER ID	NAME	SERVER IP	ACTIVE	ASTERISK	TRUNKS	GMT	MODIFY
TEST001	Test install of Asterisk server	10.10.10.15	Y	1.4.21.2	23	-5:00	MODIFY

VERSION: 2.4.364a
BUILD: 120409-1136
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Figure 24. Admin - Servers List

ADMIN - SERVERS

If you click on the “Servers” link you will see the Servers list. This page will list the server ID, server name, server IP address, Asterisk version, active status and a link to modify the server information.

Add a New Server

You can get to the Add Server screen by clicking on the "ADD A NEW SERVER" link at the top of the admin page. The add a server screen has the 5 required fields that are needed to have a valid server record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new server you must make sure that you set the server ID, server name, server_ip and Asterisk version or the submission will not be accepted. Also, please make sure that the server ID you have chosen does not have any spaces or punctuation, only letters or numbers.

Modify Servers

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

From the LIST ALL SERVERS screen you can click on the MODIFY link for any server entry to modify it's record. At the bottom of the server modification page is a list of the phones, conferences and VICIdial_conferences that are listed in the system as belonging to that server, each with a link to go to it's phone or conference modification page.

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

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

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

Active - Set whether the Asterisk server is active or inactive.

System Load - These two statistics show the loadavg of a system times 100 and the CPU usage percentage of the server and is updated every minute. The loadavg should, on average, be below 100 multiplied by the number of CPU cores your system has, for optimal performance. The CPU usage percentage should stay below 50 for optimal performance.

Live Channels - This field shows the current number of Asterisk channels that are live on the system right now. It is important to note that the number of Asterisk channels is usually much higher than the number of actual calls on a system. This field is updated once every minute.

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

Admin User Group - This is the administrative user group for this Server record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Server record.

Asterisk Version - Set the version of Asterisk that you have installed on this server. Examples: '1.2', '1.0.8', '1.0.7', 'SVN', etc... This is used because versions 1.0.8 and 1.0.9 have a different method of dealing with Local/ channels, a bug that has been fixed in CVS v1.0, and need to be treated differently when handling their Local/ channels. Also, current SVN_trunk and the 1.2 release tree uses different manager and command output so it must be treated differently as well.

Max VICIdial Trunks - This field will determine the maximum number of lines that the VICIdial auto-dialer will attempt to call on this server. If you want to dedicate two full PRI T1s to VICIdial on a server then you would set this to 46. Default is 96.

Max Calls per Second - This setting determines the maximum number of calls that can be placed by the outbound auto-dialing script on this server per second. Must be from 1 to 100. Default is 20.

VICIdial Balance Dialing - Setting this field to Y will allow the server to place balance calls for campaigns in VICIdial, between multiple dialers in a cluster, so that the defined dial level can be met even if there are no agents logged into that campaign on this server. Default is N. This is only used in multi-server VICIdial setups.

VICIdial Balance Rank - This field allows you to set the order in which this server is to be used for balance dialing, if balance dialing is enabled. The server with the highest rank will be used first in placing Balance fill calls. Default is 0.

VICIdial Balance Offlimits - This setting defines the number of trunks to not allow VICIdial balance

dialing to use. For example if you have 40 max VICIdial trunks and balance offlimits is set to 10 you will only be able to use 30 trunk lines for VICIdial balance dialing. Default is 0. This is only used in multi-server VICIdial setups.

Telnet Host - This is the address or name of the Asterisk server and is how the manager applications connect to it from where they are running. If they are running on the Asterisk server, then the default of 'localhost' is fine.

Telnet Port - This is the port of the Asterisk server Manager connection and is how the manager applications connect to it from where they are running. The default of '5038' is fine for a standard install.

Manager User - The username or login used to connect generically to the Asterisk server manager. Default is 'cron'

Manager Secret - The secret or password used to connect generically to the Asterisk server manager. Default is '1234'

Manager Update User - The username or login used to connect to the Asterisk server manager optimized for the Update scripts. Default is 'updatecron' and assumes the same secret as the generic user.

Manager Listen User - The username or login used to connect to the Asterisk server manager optimized for scripts that only listen for output. Default is 'listencron' and assumes the same secret as the generic user.

Manager Send User - The username or login used to connect to the Asterisk server manager optimized for scripts that only send Actions to the manager. Default is 'sendcron' and assumes the same secret as the generic user.

Conf File Secret - This is the secret, or password, for the server in the IAX auto-generated conf file for this server on other servers. Limit is 20 characters alphanumeric dash and underscore accepted. Default is test.

Local GMT offset - The difference in hours from GMT time not adjusted for Daylight-Savings-Time of the server. Default is '-5'(Eastern USA Time zone)

VMail Dump Exten - The extension prefix used on this server to send calls directly through AGC to a specific voicemail box. Default is '85026666666666'

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

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

System Performance - Setting this option to Y will enable logging of system performance stats for the server machine including system load, system processes and Asterisk channels in use. Default is N.

This field must be enabled if you want to be able to view the graphs on the server performance report.

Server Logs - Setting this option to Y will enable logging of all VICIdial related scripts to their text log files. Setting this to N will stop writing logs to files for these processes, also the screen logging of asterisk will be disabled if this is set to N when Asterisk is started. Default is Y. To optimize system performance, you may want to disable server logs. It will reduce on hard drive usage and save drive space. We do recommend leaving this enabled when you first start running your system so that you can use the logs to debug problems if necessary.

AGI Output - Setting this option to NONE will disable output from all VICIdial related AGI scripts. Setting this to STDERR will send the AGI output to the Asterisk CLI. Setting this to FILE will send the output to a file in the logs directory. Setting this to BOTH will send output to both the Asterisk CLI and a log file. Default is FILE. To optimize system performance, you may want to disable AGI output. It will reduce on hard drive usage and save drive space. We do recommend leaving this enabled when you first start running your system so that you can use the AGI output logs to debug problems if necessary.

Carrier Logging Active - This setting allows you to log all hangup return codes for any outbound list dialing calls that you are placing. Default is N.

Recording Web Link - This setting allows you to override the default of the display of the recording link in the administration web pages. Default is SERVER_IP.

Alternate Recording Server IP - This setting is where you can put a server IP or other machine name that can be used in place of the server_ip in the links to recordings within the administration web pages. Default is empty.

External Server IP - This setting is where you can put a server IP or other machine name that can be used in place of the server_ip when using a webphone in the agent interface. For this to work you also must have the phones entry set to use the External Server IP. Default is empty.

Active Twin Server IP - Some vicidial systems require setting up vicidial servers in pairs. This setting is where you can put the server IP of another vicidial server that this server is twinned with. Server twining is required for Orecx integration. (See the Orecx integration section of this manual) Default is empty for disabled.

Active Asterisk Server - If Asterisk is not running on this server, or if VICIdial should not be using this server, or if are only using this server for other scripts like the hopper loading script you would want to set this to N. Default is Y.

Active Agent Server - Setting this option to N will prevent agents from being able to login to this server through the VICIdial agent screen. This is very useful when using a phone login load balanced setup. Default is Y.

Generate conf files - If you would like the system to auto-generate asterisk conf files based upon the phones entries, carrier entries and load balancing setup within VICIdial then set this to Y. Default is Y.

Rebuild conf files - If you want to force a rebuilding of the Asterisk conf files, or if any of the phones or carrier entries have changed then this should be set to Y. After the conf files have been generated and Asterisk has been reloaded then this will be changed to N. Default is Y.

Rebuild Music On Hold - If you want to force a rebuilding of the music on hold files or if the music on hold entries or server entries have changed then this should be set to Y. After the music on hold files have been synchronized and reloaded then this will be changed to N. Default is Y.

Sounds Update - If you want to force a check of the sound files on this server, and the central audio store is enabled as a system setting, then this field will allow the sounds updater to run at the next top of the minute. Any time an audio file is uploaded from the web interface this is automatically set to Y for all servers that have Asterisk active. Default is N.

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

Carrier Logging Active - This setting allows you to log all hangup return codes for any outbound list dialing calls that you are placing. Default is N.

VICIdial Server Trunks

VICIdial Server Trunks allows you to restrict the outgoing lines that are used on this server for campaign dialing on a per-campaign basis. You have the option to reserve a specific number of lines to be used by only one campaign as well as allowing that campaign to run over its reserved lines into whatever lines remain open, as long as the total lines used by VICIdial on this server is less than the Max VICIdial Trunks setting. Not having any of these records will allow the campaign that dials the line first to have as many lines as it can get under the Max VICIdial Trunks setting.

Conf File Templates

Templates can be optionally used in phones entries and server carriers entries to keep the same set of parameters (such as allow=gsm to allow the GSM codec to be used) across multiple entries.

Template ID - This field needs to be at least 2 characters in length and no more than 15 characters in length, no spaces. This is the ID that will be used to identify the conf template throughout the system.

Template Name - This is the descriptive name of the conf file template entry.

Admin User Group - This is the administrative user group for this Template record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Template record.

Template Contents - This field is where you can enter in the specific settings to be used by all phones and-or carriers that are set to use this conf template. Fields that should NOT be included in this box are: secret, accountcode, account, username and mailbox.

VICIdial ADMINISTRATION		HOME Timeslock Logout (6666)		Tuesday April 24, 2012 17:04:55 PM			
Show Carriers Add A New Carrier Copy A Carrier							
CARRIER LISTINGS:							
Carrier ID	Carrier Name	Server IP	Protocol	Registration	Active	ADMIN GROUP	MODIFY
IAXEXAMPLE	TEST IAX carrier example	10.10.10.15	IAX2	register => testcarrier:10.10.10.15:4569	N	--ALL--	MODIFY
PARAXIP	TEST ParaGp CPD example	10.10.10.15	SIP		N	--ALL--	MODIFY
SIPEXAMPLE	TEST SIP carrier example	10.10.10.15	SIP	register => testcarrier:10.10.10.15:5060	N	--ALL--	MODIFY

Figure 25. Server Carriers

Server Carriers(Trunks)

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

Carrier ID - This field needs to be at least 2 characters in length and no more than 15 characters in length, no spaces. This is the ID that will be used to identify the carrier for this specific entry throughout the system.

Carrier Name - This is the descriptive name of the carrier entry.

Carrier Description - This is put in the comments of the asterisk conf files above the dialplan and account entries. Maximum 255 characters.

Admin User Group - This is the administrative user group for this Carrier record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Carrier record.

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

Template ID - This optional field allows you to choose a conf file template for this carrier entry.

Account Entry - This field is used if you have not selected a template to use, and it is where you can

enter in the specific account settings to be used for this carrier. If you will be taking in inbound calls from this carrier trunk you might want to set the context=trunkinbound within this field so that you can use the DID handling process within VICIdial.

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

Globals String - This optional field allows you to define a global variable to use for the carrier in the dialplan.

Dialplan Entry - This optional field allows you to define a set of dialplan entries to use for this carrier.

Server IP - This is the server that this specific carrier record is associated with.

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

[HOME](#) | [Timeclock](#) | [Logout](#) (6666)

[Show Conferences](#) | [Add A New Conference](#) | [Show VICIDIAL Conferences](#) | [Add A New VICIDIAL Conference](#)

[Users](#)
[Campaigns](#)
[Lists](#)
[Scripts](#)
[Filters](#)
[Inbound](#)
[User Groups](#)
[Remote Agents](#)
Admin
[Call Times](#)
[Shifts](#)
[Phones](#)
[Templates](#)
[Carriers](#)
[Servers](#)
[Conferences](#)
[System Settings](#)
[Screen Labels](#)
[System Statuses](#)
[Voicemail](#)
[Audio Store](#)
[Music On Hold](#)
[Text To Speech](#)
[CallCard Admin](#)
[Contacts](#)
[Reports](#)

CONFERENCE LISTINGS:

CONFERENCE	SERVER IP	EXTENSION	MODIFY
8600001	10.10.10.15		MODIFY
8600002	10.10.10.15		MODIFY
8600003	10.10.10.15		MODIFY
8600004	10.10.10.15		MODIFY
8600005	10.10.10.15		MODIFY
8600006	10.10.10.15		MODIFY
8600007	10.10.10.15		MODIFY
8600008	10.10.10.15		MODIFY
8600009	10.10.10.15		MODIFY
8600010	10.10.10.15		MODIFY
8600011	10.10.10.15		MODIFY
8600012	10.10.10.15		MODIFY
8600013	10.10.10.15		MODIFY
8600014	10.10.10.15		MODIFY
8600015	10.10.10.15		MODIFY
8600016	10.10.10.15		MODIFY
8600017	10.10.10.15		MODIFY
8600018	10.10.10.15		MODIFY
8600019	10.10.10.15		MODIFY
8600020	10.10.10.15		MODIFY
8600021	10.10.10.15		MODIFY
8600022	10.10.10.15		MODIFY
8600023	10.10.10.15		MODIFY
8600024	10.10.10.15		MODIFY
8600025	10.10.10.15		MODIFY
8600026	10.10.10.15		MODIFY
8600027	10.10.10.15		MODIFY
8600028	10.10.10.15		MODIFY
8600029	10.10.10.15		MODIFY
8600030	10.10.10.15		MODIFY
8600031	10.10.10.15		MODIFY
8600032	10.10.10.15		MODIFY
8600033	10.10.10.15		MODIFY
8600034	10.10.10.15		MODIFY
8600035	10.10.10.15		MODIFY
8600036	10.10.10.15		MODIFY
8600037	10.10.10.15		MODIFY
8600038	10.10.10.15		MODIFY
8600039	10.10.10.15		MODIFY
8600040	10.10.10.15		MODIFY
8600041	10.10.10.15		MODIFY
8600042	10.10.10.15		MODIFY
8600043	10.10.10.15		MODIFY
8600044	10.10.10.15		MODIFY
8600045	10.10.10.15		MODIFY
8600046	10.10.10.15		MODIFY
8600047	10.10.10.15		MODIFY
8600048	10.10.10.15		MODIFY
8600049	10.10.10.15		MODIFY

VERSION: 2.4.364a

BUILD: 120409-1136

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Figure 26. ADMIN - Conferences List

ADMIN - CONFERENCES and VICIdial CONFERENCES

Because the Conferences and VICIdial conferences sections are almost identical in function this section will cover both of them. If you click on the “Conferences” link you will see the Conferences list. This page will list the server IP address, Conference number and a link to modify the Conference information. In most cases you will only need to set up conferences once, or if your System Administrator has done this then you will never have to use this section.

Add a New Conference

You can get to the Add Conference screen by clicking on the "ADD A NEW CONFERENCE" link at the top of the admin page. All that needs to be added is the server IP address and a conference number.

Modify Conferences

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

From the SHOW ALL CONFERENCES screen you can click on the MODIFY link for any conference entry to modify it's record.

Conference Number - This field is where you put the meetme conference dialplan number. It is also recommended that the meetme number in meetme.conf matches this number for each entry. This is for the conferences in astGUIclient and is used for leave-3way-call functionality in VICIdial.

Server IP - The menu where you select the Asterisk server that this conference will be on.

Current Extension - The phone that has reserved this conference(only filled-in if active).

[Click here to see Admin changes to the system settings](#)

ADMIN - SYSTEM SETTINGS

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

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

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

Phone Codes – Each set of digits, separated by the dash “-”, represent phone code totals in VICIdial. The 1st set of digits are the total country codes (includes country code, timezone, & area code). The 2nd set are the ZIP codes (includes ZIP code, area code, state prefix, & time zone). The possible 3rd set is a proprietary list that can be purchase additionally from VICIdial. It contains up-to-date (updated annually) NPA-NXX information and 0.6% more accurate than using just the default area code.

Today System Stats – Simply indicates active back-end processing on the dialer for the day. This should never indicate all zeroes.

Use Non-Latin - This option allows you to default the web display script to use UTF8 characters and not do any latin-character-family regular expression filtering or display formatting. Default is 0.

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

VICIdial Agent Disable Display - This field is used to select when to show an agent when their session has been disabled by the system, a manager action or by an external measure. The NOT_ACTIVE setting will disable the message on the agents screen. The LIVE_AGENT setting will only display the disabled message when the agents VICIdial_auto_calls record has been removed, such as during a force logout or emergency logout. The Default is ALL.

Allow SIPSAK Messages - If set to 1, this will allow the phones table setting to work properly, the server will send messages to the SIP phone to display on the phone LCD display when logged into VICIdial. This feature only works with SIP phones and requires sipsak application to be installed on the web server. Default is 0.

Admin Home URL - This is the URL or web site address that you will go to if you click on the HOME link at the top of the admin.php page.

Admin Modify Auto-Refresh - This is the refresh interval in seconds of the modify screens in this admin interface. Setting this to 0 will disable it, setting it below 5 will mostly make the modify screens unusable because they will refresh too quickly to change fields. This option is useful in situations where more than one manager is controlling settings on an active campaign or in-group so that the settings are refreshed frequently. Default is 0.

Admin No-Cache - Setting this to 1 will set all admin pages to web browser no-cache, so every screen has to be reloaded every time it is viewed, even if clicking back on the browser. Default is 0 for disabled.

Enable Agent Transfer Logfile - This option will log to a text logfile on the webserver every time a call is transferred to an agent. Default is 0, disabled.

Enable Agent Disposition Logfile - This option will log to a text logfile on the webserver every time a call is dispositioned by an agent. Default is 0, disabled.

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

Default Local GMT - This setting defines what will be used by default when new phones and servers are added using this admin web interface. Default is -5.

Default Voicemail Zone - This setting defines what zone will be used by default when new phones and voicemail boxes are created. The list of available zones is directly taken from the voicemail.conf file. Default is eastern.

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

Agent Screen Header Date Format - This menu allows you to choose the format of the date that shows up at the top of the VICIdial agent screen. The options for this setting are: default is MS_DASH_24HR.

- MS_DASH_24HR 2008-06-24 23:59:59 - Default date format with year month day followed by 24 hour time
- US_SLASH_24HR 06/24/2008 23:59:59 - USA date format with month day year followed by 24 hour time
- EU_SLASH_24HR 24/06/2008 23:59:59 - European date format with day month year followed by 24 hour time
- AL_TEXT_24HR JUN 24 23:59:59 - Text date format with abbreviated month day followed by 24 hour time
- MS_DASH_AMPM 2008-06-24 11:59:59 PM - Default date format with year month day followed by 12 hour time
- US_SLASH_AMPM 06/24/2008 11:59:59 PM - USA date format with month day year followed by 12 hour time
- EU_SLASH_AMPM 24/06/2008 11:59:59 PM - European date format with day month year followed by 12 hour time
- AL_TEXT_AMPM JUN 24 11:59:59 PM - Text date format with abbreviated month day followed by 12 hour time

Agent Screen Customer Date Format - This menu allows you to choose the format of the customer time zone date that shows up at the top of the Customer Information section of the VICIdial agent screen. The options for this setting are: default is AL_TEXT_AMPM

- MS_DASH_24HR 2008-06-24 23:59:59 - Default date format with year month day followed by 24 hour time
- US_SLASH_24HR 06/24/2008 23:59:59 - USA date format with month day year followed by 24 hour time
- EU_SLASH_24HR 24/06/2008 23:59:59 - European date format with day month year followed by 24 hour time
- AL_TEXT_24HR JUN 24 23:59:59 - Text date format with abbreviated month day followed by 24 hour time
- MS_DASH_AMPM 2008-06-24 11:59:59 PM - Default date format with year month day followed by 12 hour time
- US_SLASH_AMPM 06/24/2008 11:59:59 PM - USA date format with month day year followed by 12 hour time
- EU_SLASH_AMPM 24/06/2008 11:59:59 PM - European date format with day month year followed by 12 hour time
- AL_TEXT_AMPM JUN 24 11:59:59 PM - Text date format with abbreviated month day followed by 12 hour time

Agent Screen Customer Phone Format - This menu allows you to choose the format of the customer phone number that shows up in the status section of the VICIdial agent screen. The options for this setting are: default is US_PARN

- US_DASH 000-000-0000 - USA dash separated phone number
- US_PARN (000)000-0000 - USA dash separated number with area code in parenthesis
- MS_NODS 0000000000 - No formatting
- UK_DASH 00 0000-0000 - UK dash separated phone number with space after city code
- AU_SPAC 000 000 000 - Australia space separated phone number
- IT_DASH 0000-000-000 - Italy dash separated phone number

- FR_SPAC 00 00 00 00 00 - France space separated phone number

Agent API Active - If set to 1, this will allow the Agent API interface to function. Default is 0.

Agent Only Callback Campaign Lock - This option defines whether AGENTONLY callbacks are locked to the campaign that the agent originally created them under. Setting this to 1 means that the agent can only dial them from the campaign they were set under, 0 means that the agent can access them no matter what campaign they are logged into. Default is 1.

Central Sound Control Active - This option defines whether the sound synchronization system is active across all servers. Default is 0 for inactive.

Sounds Web Server - This is the server name or IP address of the web server that will be handling the sound files on this system, this must match the server name or IP of the machine you are trying to access the audio_store.php webpage on or it will not work. Default is 127.0.0.1.

Sounds Web Directory - This auto-generated directory name is created at random by the system as the place that the audio store will be kept. All audio files will reside in this directory.

Admin Web Directory - This is the directory where administration web content, like admin.php, reside. Default is vicidial. To figure out your Admin web directory; it would be everything between the domain name and the admin.php in the URL on this page (without the beginning and ending slashes).

Active Voicemail Server - In multi-server systems, this is the server that will handle all voicemail boxes. This server is also where the dial-in generated prompts will be uploaded from, the 8168 recordings.

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

Outbound Auto-Dial Active - This option allows you to enable or disable outbound auto-dialing within VICIdial, setting this field to 0 will remove the LISTS and FILTERS sections and many fields from the Campaign Modification screens. Manual entry dialing will still be allowable from within the agent screen, but no list dialing will be possible. Default is 1 for active.

Max FILL Calls per Second - This setting determines the maximum number of calls that can be placed by the auto-FILL outbound auto-dialing script on for all servers, per second. Must be from 1 to 200. Default is 40.

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

PLLB Grouping Limit - Phone Login Load Balancing Grouping Limit. If PLLB Grouping Limit is set to CASCADING at the campaign level then this setting will determine the number of agents acceptable on each server across all campaigns. Default is 100.

Generate Cross-Server Phone Extensions - This option if set to 1 will generate dialplan entries for every phone on a multi-server system. Default is 0 for inactive.

User Territories Active - This setting allows you to enable the User Territories settings from the user modification screen. This feature was added to allow for more integration with a customized Vtiger installation but can have applications in a pure VICIdial system as well. Default is 0 for disabled.

Enable Second Webform - This setting allows you to have a second web form for campaigns and in-groups in the agent interface. Default is 0 for disabled.

Enable TTS Integration - This setting allows you to enable Text To Speech integration with Cepstral. This is currently only available for outbound Survey type campaigns. Default is 0 for disabled.

Enable CallCard - This setting enables the CallCard features with ViciDial to allow for callers to use pin numbers and card_ids that have a balance of minutes and those balances can have agent talk time on customer calls to in-groups deducted. Default is 0 for disabled.

Enable Custom List Fields - This setting enables the custom list fields feature that allows for custom data fields to be defined in the administration web interface on a per-list basis and then have those fields available in a FORM tab to the agent in the agent web interface. (This must also be enabled on the User level to add, modify, or delete Custom Fields. Default is 0 for disabled.

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

Enable Expanded List Stats - This setting enables two additional columns to be displayed on most of the List status breakdown tables on the list modification and campaign modification pages. Penetration is defined as the percent of leads that are at or above the campaign Call Count Limit and-or the status is marked as Completed. Default is 1 for enabled.

Enable Campaign Areacode CID - This setting enables the ability to set specific outbound caller ID numbers to be used per campaign. Default is 1 for enabled.

Enable Remote Agent Extension Overrides - This setting enables DIDs to have extension overrides for remote agent routed calls through in-groups. Default is 0 for disabled.

Contacts Enabled - Enables the Contacts sub-section in Admin interface. This allows managers to add, modify, or delete contacts in the system. They can be used as part of a Custom Transfer in a campaign where an agent can search for contacts (by first name, last name, or office number) and then select one of many phone numbers associated with that contact. This feature is often used by operators or in switchboard functions where the user would need to transfer a call to a non-agent phone. Default is 0 for disabled.

First Login Trigger - This setting allows for the initial configuration of the server screen to be shown to the administrator when they first log into the system.

Default Phone Registration Password - This is the default phone registration password. It's used when new phones are added to the system. Default is test.

Default Phone Login Password - This is the default phone web login password used when new phones are added to the system. Default is test.

Default Server Password - This is the default server password used when new servers are added to the system. Default is test.

Slave Database Server - If you have a MySQL slave database server then enter the local IP address for that server here. This option is currently only used by the selected reports in the next option and has nothing to do with automatically configuring MySQL master-slave replication. Default is empty for disabled.

Reports to use Slave DB - This option allows you to select the reports that you want to have use the MySQL slave database as defined in the option above instead of the master database that your live ViciDial system is running on. You must set up the MySQL slave replication before you can enable this option. Default is empty for disabled.

Custom Dialplan Entry - This field allows you to enter in any dialplan elements that you want for all of the asterisk servers, the lines will be added to the default context.

Reload Dialplan On Servers - This option allows you to force a reload of the dialplan on all Asterisk servers in the cluster. If you made changes in the Custom Dialplan Entry above you should set this to 1 and submit to have those changes go into effect on the servers.

Hide Label in Call Logs - If a label is set to ---HIDE--- then the agent call logs, if enabled on the campaign, will still show the field and data unless this option is set to Y. Default is N.

Default Field Labels - These 19 fields allow you to change the field name, as it will appear in the VICIdial agent interface (as well as the administrative modify lead page). Keep in mind the old field name will still appear when using the web-based lead loader. Default is empty which will use the hard-coded defaults in the agent interface. You can also set a label to ---HIDE--- to hide both the label and the field.

QC Features Active - This option allows you to enable or disable the QC or Quality Control features. Default is 0 for inactive. This feature is non-functional.

QC Last Pull Time – The time & date of the last QC query.

Default Codecs - You can define a comma delimited list of codecs to be set as the default codecs for all systems. Options for codecs include ulaw, alaw, gsm, g729, speex, g722, g723, g726, ilbc, ... Default is empty.

Default Webphone - If set to 1, this option will make all new phones created have Set As Webphone set to Y. Default is 0.

Webphone System Key - If your system or provider requires it, this is where the System Key for the webphone should be entered in. Default is empty.

Default Codecs - You can define a comma delimited list of codecs to be set as the default codecs for all systems. Options for codecs include ulaw, alaw, gsm, g729, speex, g722, g723, g726, ilbc, ... Default is empty.

Default Webphone - If set to 1, this option will make all new phones created have Set As Webphone set to Y. Default is 0.

Default External Server IP - If set to 1, this option will make all new phones created have Use External Server IP set to Y. Default is 0.

Webphone URL - This is the URL of the webphone that will be used with this system if it is enabled in the phones record that an agent is using. Default is empty.

Webphone System Key - If your system or provider requires it, this is where the System Key for the webphone should be entered in. Default is empty.

No-Answer Log - This option will log the auto-dial calls that are not answered to a separate table. Default is N.

DID Agent Log - This option will log the inbound DID calls along with an in-group and user ID, if applicable, to a separate table. Default is N.

Alt-Log DB Server - This is the alternate log database server. This is optional, and allows some logs to be written to a separate database. Default is empty.

Alt-Log DB Name - The default login for the Alt-Log database.

Alt-Log DB Password - The default password for the Alt-Log database.

Alt-Log Tables - These are the tables that are available for logging on the alternate log database server. Default is blank.

Enable QueueMetrics Logging - This setting allows you to define whether VICIdial will insert log entries into the queue_log database table as Asterisk Queues activity does. QueueMetrics is a standalone, closed-source statistical analysis program. You must have QueueMetrics already installed and configured before enabling this feature. Default is 0.

QueueMetrics Server IP - This is the IP address of the database for your QueueMetrics installation.

QueueMetrics Database Name - This is the database name for your QueueMetrics database.

QueueMetrics Database Login - This is the user name used to log in to your QueueMetrics database.

QueueMetrics Database Password - This is the password used to log in to your QueueMetrics database.

QueueMetrics URL - This is the URL or web site address used to get to your QueueMetrics installation.

QueueMetrics Log ID - This is the server ID that all VICIdial logs going into the QueueMetrics database will use as an identifier for each record.

QueueMetrics EnterQueue Prepend - This field is used to allow for prepending of one of the VICIdial_list data fields in front of the phone number of the customer for customized QueueMetrics reports. Default is NONE to not populate anything.

QueueMetrics Login-Out - This option affects how vicidial will log the logins and logouts of an agent in the queue_log. STANDARD uses the normal AGENTLOGIN AGENTLOGOFF. CALLBACK will use AGENTCALLBACKLOGIN and AGENTCALLBACKLOGOFF that QM will parse different. NONE will not log any logins and logouts within queue_log. Default is STANDARD.

QueueMetrics CallStatus - This option if set to 0 will not put in the CALLSTATUS entry into queue_log when an agent dispositions a call. Default is 1 for enabled.

QueueMetrics Addmember Enabled - This option if set to 1 will generate ADDMEMBER2 and REMOVEMEMBER entries in queue_log. Default is 0 for disabled.

QueueMetrics Dispo Pause Code - This option, if populated, allows you to define whether a dispo pause code is entered into queue_log when an agent is in dispo status. Default is empty for disabled.

QueueMetrics Phone Environment Phone Append - This option, if enabled, will append the agent phone login to the data record in the queue log table if the Campaign Phone Environment field is populated. Default is 0 for disabled.

Enable Vtiger Integration - This setting allows you to enable Vtiger integration with VICIdial. Currently links to Vtiger admin and search as well as user replication are the only integration features available. Default is 0.

Vtiger DB Server IP - This is the IP address of the database for your Vtiger installation.

Vtiger Database Name - This is the database name for your Vtiger database.

Vtiger Database Login - This is the user name used to log in to your Vtiger database.

Vtiger Database Password - This is the password used to log in to your Vtiger database.

Vtiger URL - This is the URL or web site address used to get to your Vtiger installation.

ADMIN - SYSTEM STATUSES

You can add, modify and delete system-wide statuses in the SYSTEM STATUSES sub-section of the Admin section. Through the use of system statuses, you can have statuses that exist for campaign and in-group. The Status must be 1-6 characters in length, the description must be 2-30 characters in length. Selectable defines whether it shows up in the VICIdial agent screen as an agent disposition. The human_answered field is used when calculating the drop percentage, or abandon rate. Setting human_answered to Y will use this status when counting the human-answered calls. Sale will include this status when calculating total sales. DNC indicates that status should not be called again, that it will be included in the calculation of of DNC totals, and (depending on the campaign setting) that it could be added to the internal & campaign DNC lists. Customer Contact indicates that the call was answered by a person, and will be included when calculating total human answered calls. Not Interested indicates the status should not be called again, but it is not included on any DNC lists. Unworkable indicates that the lead is not viable, regardless of whether the customer was interested or not. When Callback is set to Y, it allows any status to become a "Callback type". It will pop open a calendar, and prompt the agent to indicate the callback date & time. Completed indicates that the lead is done and does not need to be called any further, but does not fall under the DNC, Not Interested, or Unworkable categories. It's used in the calculation of several reports. The Category option allows you to group several statuses into a category that can be used for statistical analysis.

Here is a list of the default system statuses in VICIdial and what they mean:

A - Answering Machine - Agent-defined Answering Machine
AA - Answering Machine Auto - Dialer-defined Answering Machine
AB - Busy Auto - Carrier-received Busy signal
ADC - Disconnected Number Auto - Carrier-received Disconnected number
AFAX - Fax Machine Auto - Dialer-defined Fax Machine
AL - Answering Machine Msg Played - AMD(Answering Machine Detection) call sent to a message and message has been played
AM - Answering Machine Sent to Msg - AMD(Answering Machine Detection) call sent to a message to be played.
B - Busy - Agent-defined Busy signal
CALLBK - Call Back - Callback that is "live", both scheduled and non-scheduled
CBHOLD - Call Back Hold - Scheduled ANYONE callback that has not hit it's trigger, or an AGENTONLY callback
CPDATB - CPD All-Trunks-Busy - Sangoma Call Progress Detection CPD All-Trunks-Busy
CPDB - CPD Busy - Sangoma Call Progress Detection CPD Busy
CPDERR - CPD Error - Sangoma Call Progress Detection CPD Error
CPDINV - CPD Invalid-Number - Sangoma Call Progress Detection CPD Invalid-Number
CPDNA - CPD No-Answer - Sangoma Call Progress Detection CPD No-Answer
CPDREJ - CPD Reject - Sangoma Call Progress Detection CPD Reject
CPDSI - CPD Sit-Intercept - Sangoma Call Progress Detection CPD Sit-Intercept
CPDSNC - CPD Sit-No-Circuit - Sangoma Call Progress Detection CPD Sit-No-Circuit
CPDSR - CPD Sit-Reorder - Sangoma Call Progress Detection CPD Sit-Reorder
CPDSUA - CPD Service-Unavailable - Sangoma Call Progress Detection CPD Service-Unavailable
CPDSUK - CPD Sit-Unknown - Sangoma Call Progress Detection CPD Sit-Unknown
CPDSV - CPD Sit-Vacant - Sangoma Call Progress Detection CPD Sit-Vacant
CPDUK - CPD Unknown - Sangoma Call Progress Detection CPD Unknown
DC - Disconnected Number - Agent-Defined Disconnected number
DEC - Declined Sale - Agent-defined status

DNC - DO NOT CALL - If defined, lead will also go into the VICIDIAL DNC list

DNCC - DO NOT CALL Hopper Match Campaign - status of a lead that matches the phone number of a lead that has been placed in the VICIDIAL Campaign-specific DNC list for this Campaign

DNCL - DO NOT CALL Hopper Match - status of a lead that matches the phone number of a lead that has been placed in the VICIDIAL DNC list

DONEM - Done Manual - Agent placed a manual dial phone call and then closed their browser before dispositioning a lead

DROP - Agent Not Available - Call was dropped while customer was waiting for an agent

ERI - Agent Error - An agent has closed their browser before dispositioning a lead

HOLDTO - Hold time option call - Hold time option call termination on inbound call

HXFER - Hold Recall Transfer - Hold Recall Transfer to another in-group

INCALL - Lead Being Called - Agent is currently talking to the lead

N - No Answer - Agent-defined status

NA - No Answer Auto-dial - Any outbound call that does not receive an Answer signal(or other signal) from the carrier. This can include ring-no-answer, disconnected, carrier congestion and other errors.

NEW - New Lead - Lead has not been called, or cannot be called

NI - Not Interested - Agent-defined status

NP - No Pitch No Price - Agent-defined status

PM - Played Message - outbound broadcast or SURVEY campaign status for when a message has been played to the customer.

PU - Call Picked Up - Status that a call is changed to as soon as the carrier has sent the Answer signal and before the call is sent on to an agent

QUEUE - Lead To Be Called - Lead is about to be sent to an agent

QVMAIL - Queue Abandon Voicemail - Queue Abandon Voicemail Left

RQXFER - Re-Queue Transfer - Re-Queue Transfer back to agent

SALE - Sale Made - Agent-defined status

SVYEXT - Survey sent to Extension - Survey outbound campaign status only

SVYHU - Survey Hung up - Survey outbound campaign status only

SVYREC - Survey sent to Record - Survey outbound campaign status only

SVYVM - Survey sent to Voicemail - Survey outbound campaign status only

XDROP - Agent Not Available IN - Dropped call, while customer was waiting for an inbound agent

XFER - Call Transferred - Call has been sent from an agent to a Closer agent.

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System Statuses | Status Categories | QC Status Codes

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VICIDIAL STATUS CATEGORIES: ?

CATEGORY NAME	STATUSES IN THIS CATEGORY
UNDEFINED	Default Category A AA AB ADC AFAX AFTHRS AL AM B CALLBK CBHOLD DC DEC DNC DNCC DNCL DROP ERI INCALL IVRFR MAXCAL MLINAT N NA NANQUE NEW NI NP PDROP PM PU QUEUE QVMAIL ROXFER SALE SVYCLM SVYEXT SVYHU SVYREC SVYVM TIMEOT XDROP XFER

TO VDAD Display: N Sale Category: N Dead Lead Category: N

Description:

ADD NEW STATUS CATEGORY

Category ID: Name:

TimeOnVDAD Display: N Sale Category: N Dead Lead Category: N

Description:

Figure 29. VICdial System Status Categories

ADMIN - SYSTEM STATUS CATEGORIES

Through the use of system status categories, you can group together statuses to allow for statistical analysis on a group of statuses. The Category ID must be 2-20 characters in length with no spaces, the name must be 2-50 characters in length, the description is optional and TimeonVDAD Display defines whether that status will be one of the up to 4 statuses that can be calculated and displayed on the Time On VDAD Real-Time report.

VOICEMAIL ID	Name	Active	New Messages	Old Messages	Delete	ADMIN GROUP	MODIFY
201	Inbound Voicemail dropbox	Y	0	0	Y	--ALL--	MODIFY

Figure 30. Admin - Voicemail List

ADMIN - VOICEMAIL

If you click on the “Voicemail” link you will see the Voicemail list. This page will list the Voicemail box number, box name, active status, messages count, delete flag, admin group, and a link to modify the voicemail information. There are already voicemail boxes created for every Phones entry in the system. This section is for configuring additional general voicemail boxes. The most common use is as a message drop box from calls coming into one particular DID. However, voicemail can be utilized anytime an agent is not available and you want the customer to leave contact information for follow up.

Add a New Voicemail Box

You can get to the Add Voicemail screen by clicking on the "ADD A NEW VOICEMAIL ENTRY" link at the top of the admin page. The add a voicemail screen has the 5 fields that are needed to have a valid voicemail record on the system (email is optional). As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new voicemail you must make sure that you set the voicemail ID and password or the submission will not be accepted. Also, please make sure that the voicemail ID you have chosen does not have any spaces or punctuation, only numbers.

Modify Voicemail

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

From the Show Voicemail Entries screen you can click on the MODIFY link for any voicemail entry to modify its record.

Voicemail ID - This is the (all numbers) identifier of this mailbox. This must not be a duplicate of an existing voicemail ID or the voicemail ID of a phone on the system, minimum of 2 characters.

Password - This is the password that is used to gain access to the voicemail box when dialing in to check messages max 10 characters, minimum of 2 characters.

Name - This is name associated with this voicemail box. max 100 characters, minimum of 2 characters.

Active - This option allows you to set the voicemail box to active or inactive. If the box is inactive you cannot leave messages on it and you cannot check messages in it.

Email - This optional setting allows you to have the voicemail messages sent to an email account, if your system is set up to send out email. If this field is empty then no emails will be sent out.

Admin User Group - This is the administrative user group for this Voicemail record, this allows admin viewing of this record restricted by user group. Default is --ALL-- which allows any admin user to view this Voicemail record.

Delete Voicemail After Email - This optional setting allows you to have the voicemail messages deleted from the system after they have been emailed out. Default is N.

Voicemail Zone - This setting allows you to set the time zone that this voicemail box will be set to when the time is logged for a message. Default is set in the System Settings.

Voicemail Options - This optional setting allows you to define additional voicemail settings. It is recommended that you leave this blank unless you know what you are doing.

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Audio Store

Audio File to Upload:

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We **STRONGLY** recommend uploading only 16bit Mono 8k PCM WAV audio files(.wav)

All spaces will be stripped from uploaded audio file names

[audio file list](#)

[Click here to see a log of the uploads to the audio store](#)

Figure 31. Admin – Audio Store

ADMIN – AUDIO STORE

This utility allows you to upload audio files to the web server so that they can be distributed to all of the VICIdial servers in a multi-server cluster. An important note, only two audio file types will work, .wav files that are PCM 16bit 8k and .gsm files that are 8bit 8k. Please verify that your files are properly formatted before uploading them here.

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MUSIC-ON-HOLD(MOH) LISTINGS:

MOH ID	MOH Name	Active	Random Order	ADMIN GROUP	MODIFY
default	Default Music On Hold	Y	N	---ALL---	MODIFY
Boys	New Age	N	N	---ALL---	MODIFY

Figure 32. Admin – Music On Hold List

ADMIN – MUSIC ON HOLD

If you click on the “Music On Hold” link you will see the Music On Hold list. This page will list the Music On Hold ID, name, active status, random order status, admin group, and a link to modify the music on hold information.

Add a New Music On Hold Context

You can get to the Add Music On Hold screen by clicking on the "ADD A NEW MOH ENTRY" link at the top of the admin page. The add a music on hold screen has the 3 fields that are needed to have a valid music on hold record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new music on hold entry you must make sure that you set the music on hold ID and name or the submission will not be accepted. Also, please make sure that the music on hold ID you have chosen does not have any spaces or punctuation, only numbers.

Modify Music On Hold

(screen shot of the Modify Music On Hold screen available in the Appendix)

From the Show MOH Entries screen you can click on the MODIFY link for any music on hold entry to modify it's record.

Music On Hold ID - This is the short name of a Music On Hold entry. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 100 characters, minimum of 2 characters.

Music On Hold Name - This is a more descriptive name of the Music On Hold entry. This is a short summary of the Music On Hold context and will show as a comment in the musiconhold-VICIdial.conf file. max 255 characters, minimum of 2 characters.

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

Active - This option allows you to set the Music On Hold entry to active or inactive. Inactive will remove the entry from the conf files.

Random Order - This option allows you to define the playback of the audio files in a random order. If set to N then the defined order will be used.

Audio Files - This displays all audio files that make up the Music On Hold entry. The Rank pulldown allows you edit the order in which the audio files will play. The DELETE link can remove individual audio files from the MOH entry.

Filename - To add a new audio file to a Music On Hold entry the file must first be in the audio store, then you can select the file and click submit to add it to the file list. Music on hold is updated once per minute if there have been changes made. Any files not listed in a music on hold entry that are present in the music on hold folder will be deleted.

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Show TTS Entries | Add A New TTS Entry

TEXT-TO-SPEECH(TTS) LISTINGS:

TTS ID	TTS Name	Active	TTS Voice	TTS Text	ADMIN GROUP	MODIFY
testtext	hello down there	Y	Allison-8kHz		---ALL---	MODIFY

Figure 33. Admin – Text-to-Speech(TTS) List

ADMIN – TEXT TO SPEECH

If you click on the “Text To Speech” link you will see the Text to speech entry list. This page will list the TTS ID, name, active status, beginning of the prompt text and a link to modify the music on hold information. The text to speech functionality requires that Cepstral is installed and configured on your system by your systems administrator, and that the System Settings option for TTS is enabled. (See the Cepstral Integration section of this manual for more information)

Add a New Text to Speech Entry

You can get to the Add Text to Speech screen by clicking on the "ADD A NEW TTS ENTRY" link at the top of the admin page. The add a text to speech screen has the 3 fields that are needed to have a valid text to speech record on the system. As with most add-new-record forms, this one is shorter and doesn't offer all options until the new record is submitted to save space and duplication. When adding a new text to speech entry you must make sure that you set the TTS ID and name or the submission will not be accepted. Also, please make sure that the TTS ID you have chosen does not have any spaces or punctuation, only numbers and letters and underscores.

Modify Text to Speech Entry

(screen shot of the Modify Text To Speech screen available in the Appendix)

From the Show TTS Entries screen you can click on the MODIFY link for any text to speech entry to modify it's record.

TTS ID - This is the short name of a TTS entry. This needs to be a unique identifier. Do not use any spaces or punctuation for this field. max 50 characters, minimum of 2 characters.

TTS Name - This is a more descriptive name of the TTS entry. This is a short summary of the TTS definition. max 100 characters, minimum of 2 characters.

Active - This option allows you to set the TTS entry to active or inactive.

TTS Text - This is the actual Text To Speech data field that is sent to Cepstral for creation of the audio file to be played to the customer. you can use Speech Synthesis Markup Language -SSML- in this field, for example, <break time='1000ms' /> for a 1 second break. You can also use several variables such as first name, last name and title as VICIdial variables just like you do in a Script: --A--first_name--B--. Here is a list of the available variables: lead_id, entry_date, modify_date, status, user, vendor_lead_code, source_id, list_id, phone_number, title, first_name, middle_initial, last_name, address1, address2, address3, city, state, province, postal_code, country_code, gender, date_of_birth, alt_phone, email, security_phrase, comments, called_count, last_local_call_time, rank, owner

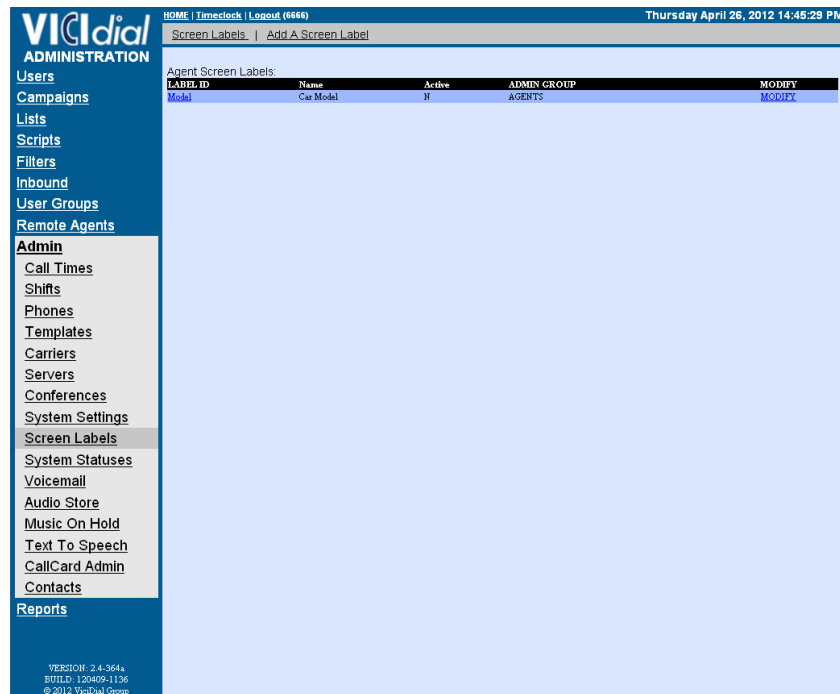


Figure 34. Screen Labels

ADMIN – SCREEN LABELS

Screen labels give you the option of setting different labels for the default agent screen fields on a per campaign basis. It is assigned in the Campaign modification page. Each Screen Label template will be listed in a pulldown named “Agent Screen Labels”. Keep in mind the old field name will still appear when using the web-based lead loader. The main page displays the Label ID, Name, Active status, Admin Group, and Modify link.

Add a New Screen Label

You can add a Screen Label template by selecting the link at the top of the page. You'll be prompted for complete the following.

Screen Label ID - This field needs to be at least 2 characters in length and no more than 20 characters in length, no spaces or special characters. This is the ID that will be used to identify the screen label throughout the system.

Screen Label Name - This is the descriptive name of the screen label entry.

Admin User Group - This is the administrative user group for this record, this allows admin viewing of this Screen Label record restricted by user group. Default is --ALL-- which allows any admin user to view this Screen Label record.

Click “submit” and you'll see the expanded screen showing each field that can be edited: *Label Title, Label First Name, Label Middle Initial, Label Last Name, Label Address1, Label Address2, Label*

Address3, Label City, Label State, Label Province, Label Postal Code, Label Vendor Lead Code, Label Gender, Label Phone Number, Label Phone Code. Label Alt Phone, Label Security Phrase, Label Email, Label Comments.

Hide Label in Call Logs - If a label is set to ---HIDE--- then the agent call logs, if enabled on the campaign, will still show the field and data unless this option is set to Y. Default is

Campaigns Using This Screen Label – Displays all campaigns that currently have this Screen Label active.

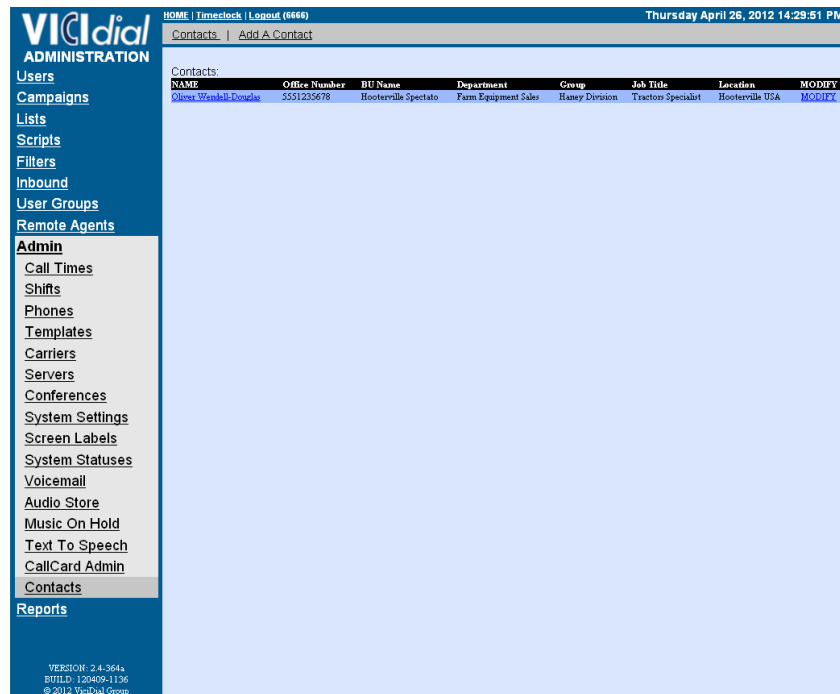


Figure 35. Contacts

ADMIN – Contacts

Contacts allows you to add modify or delete contacts in the system that can be used as part of a Custom Transfer in a campaign where an agent can search for contacts by first name last name or office number and then select one of many numbers associated with that contact. This feature is often used by operators or in switchboard functions where the user would need to transfer a call to a non-agent phone. The “Enable Contacts” field (in the Admin section, on the System Settings page) must first be set to 1 to activate. Set “Custom Transfer” to VIEW_CONTACTS and “Enable Transfer Presets” (in the campaign modification page) set to CONTACTS. This can be disabled on a per agent basis, by setting “Preset Contact Search” to DISABLED. There is also a framework in place that can optionally point to a contact table in any other MySQL (by using the Alt Log settings in System Settings), as long as they share the same schema. This framework will require good knowledge of MySQL to configure properly, so we recommend seeking qualified assistance to implement it.

Add a New Contact

Select the “Add A Contact” link at the top of the page to create a new Contact record. You will be prompted to complete the following:

First Name, Last Name, Office Number, Cell Number, Other Number 1, Other Number 2, BU Name, Department, Group, Job Title, Location

Click “submit” to save your changes.

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CallCard Summary:

STATUS	COUNT
GENERATE	9999
ACTIVE	1

There are 1000 batches in the system

Last 10 Calls:

#	CARD ID	DATE	CallerID	DID	START MIN	TALK MIN	AGENT	AGENT DATE	DISPO
0		2010-07-05 12:17:25	7275551212		0	0			
1		2010-07-05 12:11:15	7275551212		0	0			
2		2010-07-05 12:10:24	7275551212		0	0			
3		2010-07-05 11:57:33	7275551212		0	0			
4		2010-07-05 11:56:37	7275551212		0	0			
5	100-00002-10011	2010-03-12 12:02:45	7275551212	7275553332	1	1	6666	2010-03-12 12:03:10	VWN
6	100-00002-10011	2010-03-12 10:41:02	7275551212	7275553332	2	1	6666	2010-03-12 10:41:39	DEC
7	100-00002-10011	2010-03-12 10:03:42	7275551212	7275553332	3	1	6666	2010-03-12 10:04:21	NP
8	100-00002-10011	2010-03-12 10:02:13	7275551212	7275553332	1	1	6666	2010-03-12 10:02:33	NI
9	100-00002-10011	2010-03-12 08:55:05	7275551212	7275553331	2	1	6666	2010-03-12 08:55:27	NI

CallCard VERSION: 2.4-5 BUILD: 120117-1457

Figure 36. CallCard Admin

ADMIN – CALLCARD ADMIN

CallCard feature allows you to create CallCard Ids in the system with a predetermined number of minutes. The CallCard Ids are issued to your customers, and when they call in, the talk time on the phone with the agent is deducted from the card. It allows you to easily track & assess the agents time to the customer. There are several applications for this including: paid support queues, chat lines, advisor services, financial advice, legal services. The system consists of an AGI script that takes calls in, asks for and validates the pin/status/balance and sends them to a defined in-group, then the deduction of time from the customer's account starts once the agent receives the call. Also, there will be an option for an alert to low balance injected into the calling session. This currently exists as framework in VICIdial. While this allows for variety of customization options, it also requires knowledgeable VICIdial support to implement. (See our CallCard document at:

<http://vicidial.org/docs/CALLCARD.txt>)

AGI Script involved in call card feature:
agi-CALLCARD_dial_in.agi

Web scripts involved:
callcard_admin.php
callcard_export_report.php

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

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Users
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USER CALLBACK HOLD LISTINGS: 122

LEAD	LIST	CAMPAIGN	ENTRY DATE	CALLBACK DATE	USER	RECIPIENT	STATUS	GROUP
1196	300		2012-04-27 10:37:23	2012-05-03 10:00:00	122	USERONLY	ACTIVE	
133090	600		2012-04-24 15:51:55	2012-04-30 13:00:00	122	ANYONE	ACTIVE	
133092	600		2012-04-24 15:55:24	2012-04-30 18:30:00	122	ANYONE	ACTIVE	
133097	600		2012-04-26 11:31:29	2012-05-01 13:00:00	122	ANYONE	ACTIVE	
133120	600		2012-04-26 11:32:24	2012-05-03 13:00:00	122	ANYONE	ACTIVE	

[Remove LIVE Callbacks older than one month for this user](#)
[Remove LIVE Callbacks older than one week for this user](#)

VERSION: 2.4-363a
BUILD: 120402-2111
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Figure 37. VICIdial Scheduled Callbacks

VICIdial SCHEDULED CALLBACKS

Scheduled CallBacks are leads that have been defined by an Agent to be contacted again at a specific date and time in the future. There are two types of Scheduled CallBacks: ANYONE callbacks which go back into the hopper for a campaign (after their callback date and time is reached) and USERONLY callbacks which are only able to be called by the agent that set the callback. Both types of callbacks can be modified by a manager if they have permissions to do so.

Callback records can be displayed in the VICIdial admin.php interface in many ways: by user, by campaign or by list. At the bottom of the user, campaign and list modification screens you will see a link that will read "Click here to see all CallBack Holds for this user" or IN THIS CAMPAIGN or LIST depending on which screen you are in. If you click on this link you will see a list of the Scheduled Callbacks with the lead, list ID, campaign, date the customer was last called, date the callback is scheduled for, the User ID of the Agent that set the callback, whether the callback is ANYONE or USERONLY and what the status of the Scheduled Callback is. If an ANYONE Callback is LIVE it will be put back in the hopper and the status will be changed to CALLBK so that it can be called quickly. If an USERONLY callback is LIVE or ACTIVE it can be called by an agent when it is convenient for them by using their Scheduled Callbacks link on their VICIdial client screen.

If you want to edit a Scheduled Callback record, all you need to do is click on the lead ID in the list of Scheduled callbacks mentioned above. This will take you to the lead modification page where you can simply change the status of a lead to remove the callback record, or you can change it to an ANYONE callback if it is USERONLY, change the user ID associated with the Callback record if it is USERONLY or change the callback from ANYONE to USERONLY and specify a User ID to give it

to. Note, you can only do this if you have permissions in your USER account to modify leads.

Administrators can also purge old callbacks by using the links at the bottom of the screen.

VICIdial Timeclock

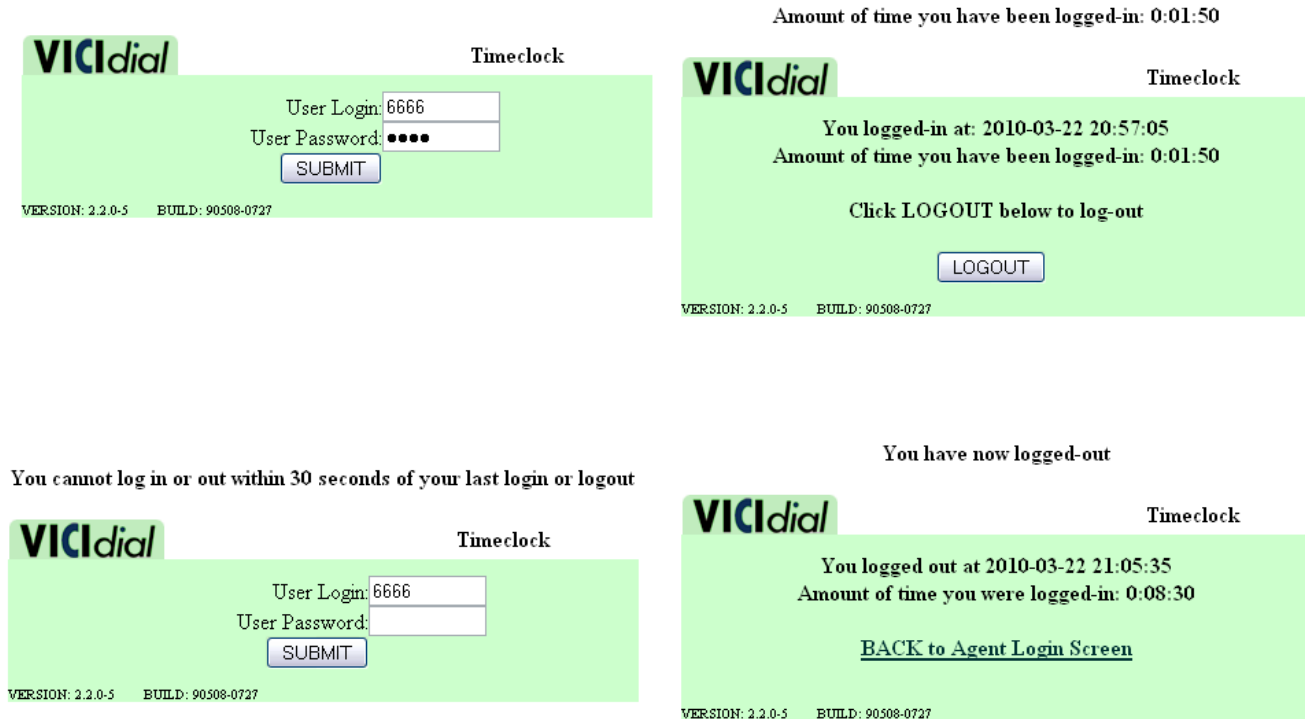


Figure 38. VICIdial Timeclock

As of version 2.0.5 of VICIdial there is now a separate time clock application built in to VICIdial. This application can be used by an VICIdial user, and with VICIdial agents you can force them to log in on the Timeclock before they are allowed to log in to the VICIdial agent interface (This is a User Group setting). The process of logging in to the time clock is very simple and is covered in more detail in the VICIdial Agent Manual. There is a link to log in to the Time clock at the top of the VICIdial agent interface log in screen as well as at the top of the VICIdial Administration interface.

There is also an Administrative utility to alter timeclock records and there are two reports that utilize Time clock data. For more information on the timeclock reports, see the VICIdial Stats and Reports section of this manual.

Timeclock Records Editing

Time clock logs are stored in an active log table as well as an audit log table in the database. The audit log exists to show what was originally logged and it cannot be altered (The audit log is only viewable by a system administrator). The active timeclock log shows the active time clock records with any administrative changes that were made including noting if a record was changed or not. A timeclock record can only be changed if the record has both a log in and a log out. If a user is still logged in to the timeclock that active record cannot be altered until that user logs out. There is also a system setting (Timeclock End of Day) to set the force logout time for all users still logged into the system since no timeclock record can be more than 24 hours long. A timeclock record will be marked as AUTOLOGOUT if a force logout by the system has occurred at the Timeclock End of Day.

User Status Page

The first place that a timeclock record can be changed is on the User Status page. There are links to the User Status page from the VICIdial Real-time screen as well as from the User Modification page and the User Stats page. On the user Status page you can see when the user logged in to the timeclock, if they are logged in, as well as the option to force log them in or out of the timeclock.

User Stats Page

The second place that you can edit timeclock records is on the User Stats page. This page shows all of the different kinds of activities that an agent can do and it will show the timeclock activity of an agent within the system as well. To alter a timeclock record from this page, first select the date range at the top of the page and click submit, then go down to the TIMECLOCK LOGIN/LOGOUT TIME section of the page and you can click on the timeclock ID of the record that you wish to change. This will take you to the timeclock record edit screen. On this screen you can change the Login and Logout times as well as add notes about why you would be making the change. If you do change the Login or Logout times the system will validate your changes and if they are not valid it will not let you click on the Submit button. This can happen if the date is not formatted properly or if the logout time is before the login time, or the logout time is more than 24 hours past the login time.

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Tuesday April 24, 2012 17:36:24 PM

Server Stats and Reports

Real-Time Reports

- [Real-Time Main Report](#)
- [Real-Time Campaign Summary](#)

Agent Reports

- [Agent Time Detail](#)
- [Agent Status Detail](#)
- [Agent Performance Detail](#)
- [Team Performance Detail](#)
- [Single Agent Daily](#)
- [User Stats](#)
- [User Time Sheet](#)

Inbound and Outbound Calling Reports

- [Inbound Report](#)
- [Inbound Report by DID](#)
- [Inbound Service Level Report](#)
- [Inbound Summary Hourly Report](#)
- [Inbound Daily Report](#)
- [Inbound DID Report](#)
- [Inbound IVR Report](#)
- [Outbound Calling Report](#)
- [Outbound Summary Interval Report](#)
- [Outbound IVR Report - Export](#)
- [Fronter - Closer Report](#)
- [Lists Campaign Statuses Report](#)
- [Campaign Status List Report](#)
- [Export Calls Report](#)
- [Export Leads Report](#)

Time Clock Reports

- [User Timeclock Report](#)
- [User Group Timeclock Status Report](#)
- [User Timeclock Detail Report](#)

Other Reports and Links

- [Server Performance Report](#)
- [Maximum System Stats](#)
- [Administration Change Log](#)
- [CallCard Search](#)

SERVER	+	DESCRIPTION	IP	ACT	LOAD	CHAN	DISK	OUTBOUND	INBOUND
TESTast		Test install of Asterisk server	10.10.10.15	Y	0 - 100%	0	1%	LINK	LINK

[Admin Utilities](#)

VERSION: 2.4-364

BUILD: 120409-1136

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Figure 39. VICIdial Statistics and Reports

VICIdial STATS AND REPORTS

You can get to the Stats and Reports page by clicking on the REPORTS link at the far right of the top of the section bar at the top of the admin.php page. This page has links to many different summary and real-time reports that you can run on the activity of your VICIdial system.

System-Wide Reports

The first set of reports available from the REPORTS section are all System-Wide reports, meaning that on a multiple server setup they show stats for activity across all servers together.

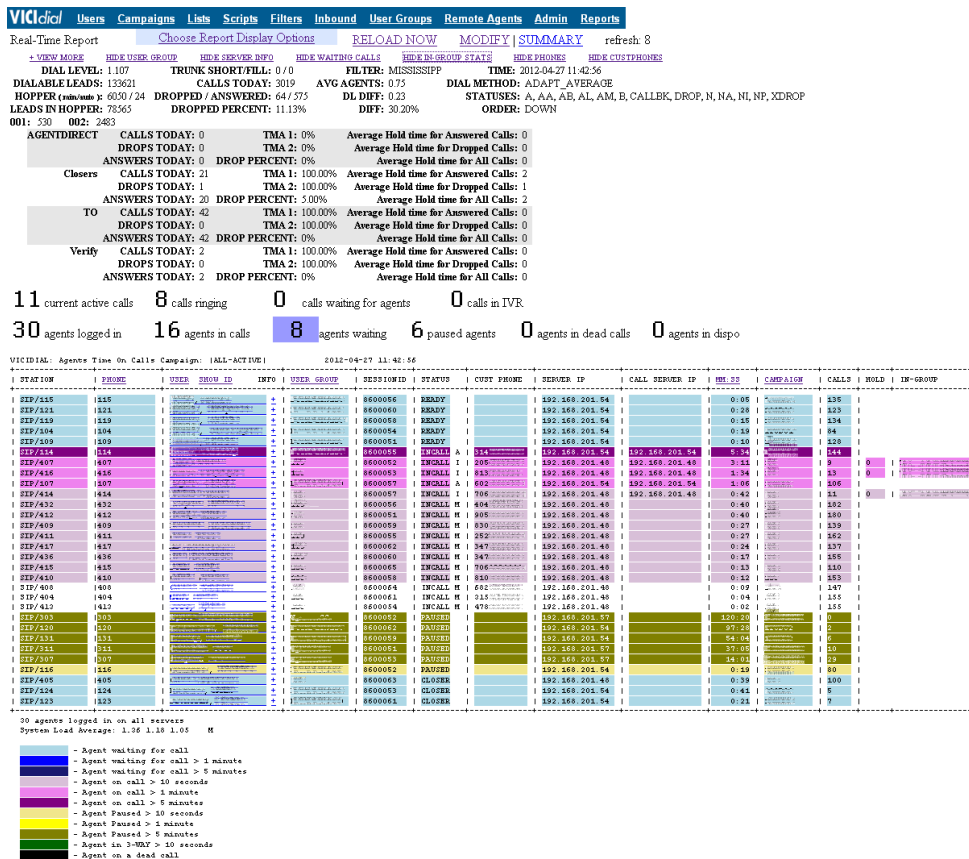


Figure 40. Real Time Main Report per Campaign

REAL TIME MAIN REPORT - PER CAMPAIGN

This is also known as the “Time on VDAD” report, and is also linked to from the campaign modification pages. This report refreshes every 40 seconds by default. The refresh rate can be modified from the “Choose Report Display Options” link at the top of the real-time screen. The report displays from the campaign (or campaigns) you are viewing: Dial level, statuses to be dialed, the order of the leads to be dialed, the lead filter if there is one, the hopper level for this campaign, the leads currently in the hopper for this campaign right now, the number of dialable leads in the entire database according to the criteria set for the campaign, the number of calls placed (or taken) for this campaign today, the number of dropped and answered calls in this campaign today, the drop percentage(out of answered calls) and the current time. Out of the TRUNK SHORT/FILL numbers, the SHORT(or first number) will show how many calls the dialer is unable to place because there are not enough lines available for the servers dialing on this campaign, and the FILL number will show how many lines on other dialers are being used to try to make up the shortfall.

Below these stats is a listing of the number of live calls(or calls being placed) for this campaign, the number of agents on calls, the number of agents waiting for calls and the number of agents that are currently paused in the campaign. The "calls waiting" and "agents waiting" numbers if higher than zero will turn red or blue respectively and get darker as their number goes up, being a very visible indicator of how the dialing for the campaign is going. Below these lines is the listing of agents logged-in, color coded their state: yellow is paused, blue is waiting for a call, white is on a call, purple is being on a call and black is the agent is still on the call screen but the customer has hung up. These colors also get darker the longer the agent is in a state.

If you click on the “Choose Report Display Options” link at the top of the page, a panel will open up with several options in it. One of the options is for inbound. If you select NO then no accounting for inbound calls will be taken for the numbers in the report, YES will include inbound calls for the in-groups allowed for the campaign into the report, and ONLY will only show inbound calls coming into allowable in-groups for the selected campaigns. If you have this set to ONLY, then you will notice that the stats at the top change and you will see items like average hold time and other inbound-only statistics. The “Select Campaigns” allows you to view just campaign in the real-time report, or by holding down “ctrl” and selecting several campaigns. When viewing multiple campaigns in the real-time report, keep in mind that the statistics displayed represent either combined totals or averages (depending on the stat). “Select User Groups” offers the same options, except sorted by User Group.

other options include:

- Agent Time Stats displaying time clock information
- Running the "Dialable Lead Alert" shows which campaigns do not currently have lead loaded into the dial hopper
- "Show Ingroup Drop Row" displays the ingroup on inbound calls, along with the total time the spent in queue.
- Another option is to see carrier hangup code statistics for calls that ended in the last several minutes and hours.

An optional element for this screen are counts of the dispositions for status categories. Up to 4 of these Status Category counts can be displayed below the LEADS IN HOPPER line at the top of the report.

Vicidial [Users](#) [Campaigns](#) [Lists](#) [Scripts](#) [Filters](#) [Inbound](#) [User Groups](#) [Remote Agents](#) [Admin](#) [Reports](#)

Real-Time Report [Choose Report Display Options](#) [RELOAD NOW](#) [MODIFY](#) | [SUMMARY](#) refresh: 0

[+ VIEW MORE](#) [VIEW USER GROUP](#) [SHOW SERVER INFO](#) [HIDE WAITING CALLS](#) [SHOW IN-GROUP STATS](#) [SHOW PHONES](#) [SHOW CUSTPHONES](#)

DIAL LEVEL: 1.000 TRUNK SHORT/FILL: / 0 FILTER: MISSISSIPPI TIME: 2012-04-27 13:37:26
 DIALABLE LEADS: 8799 CALLS TODAY: 3211 AVG AGENTS: 0.00 DIAL METHOD: INBOUND_MAN
 HOPPER (min/auto): 500 / 2 DROPPED / ANSWERED: 0 / 228 DL DIFF: 0.00 STATUSES: NSAE, CNSNI, NI, NEW, CALLEK, A
 LEADS IN HOPPER: 926 DROPPED PERCENT: 0% DIFF: 0.00% ORDER: RANDOM
 001: 200 002: 3002

2 current active calls 0 calls ringing 0 calls waiting for agents 0 calls in IVR
 15 agents logged in 11 agents in calls 1 agents waiting 2 paused agents 0 agents in dead calls 1 agents in dispo

VICIDIAL: Agents Time On Calls Campaign: [129] 2012-04-27 13:37:26

STATION	USER	SHOW ID	INFO	SESSIONID	STATUS	MM:SS	CAMPAIGN	CALLS	HOLD	IN-GROUP
SIP/414			+	8600057	INCALL I	2:50		17	0	
SIP/412			+	8600051	INCALL M	0:56		320		
SIP/407			+	8600052	INCALL I	0:38		20	0	
SIP/413			+	8600054	INCALL M	0:27		238		

Agent: 1037 - Richard Moreland Campaign: 129 [Close](#)

Selected In-Groups: AGENTDIRECT - Single Agent Direct Queue
 Inbound
 Verify - Verification

Change, Add, Remove: CHANGE - Set in-groups to those selected above

Blended Outbound Autodial: No

Set As User Default: No

[Submit Changes](#)

- Agent in 3-WAY > 10 seconds
 - Agent on a dead call

Figure 41. Changing In-Groups from the Real-time report

REAL TIME MAIN REPORT – CHANGE IN-GROUPS

Added in the previous 2.2.1 release is the ability to change the selected In-Groups for an agent immediately from the Real-Time report without requiring an agent to log out.

To do this you simply need to click on the plus sign “+” on the left side of the USER column for the user that you want to modify. When you click on the plus, you will see something like the image in the figure above.

Now you can select one or more In-Groups that this agent will take calls from (you can select more than one by holding down the “Ctrl” key on your keyboard as you click on them).

The next field is where you can choose to Add, Remove or Change the In-groups you have selected from the in-groups that the agent has selected currently. Add will only add in-groups and not remove any from the ones currently selected for the agent, Remove will only delete in-groups from the ones selected for the agent. Change will replace whatever is currently selected for the agent with what you have selected in the “Selected in-Groups” select list.

Next is the Blended option. This will enable or disable automatic outbound dialing for this agent if it is available for the campaign.

The last option will allow you to set what you have selected as the default selected in-groups for the agent if this is set to YES.

To have full access to this feature, your user account must have the following settings set to “1”: View Reports, API Access, Change Agent Campaign, Modify Users.

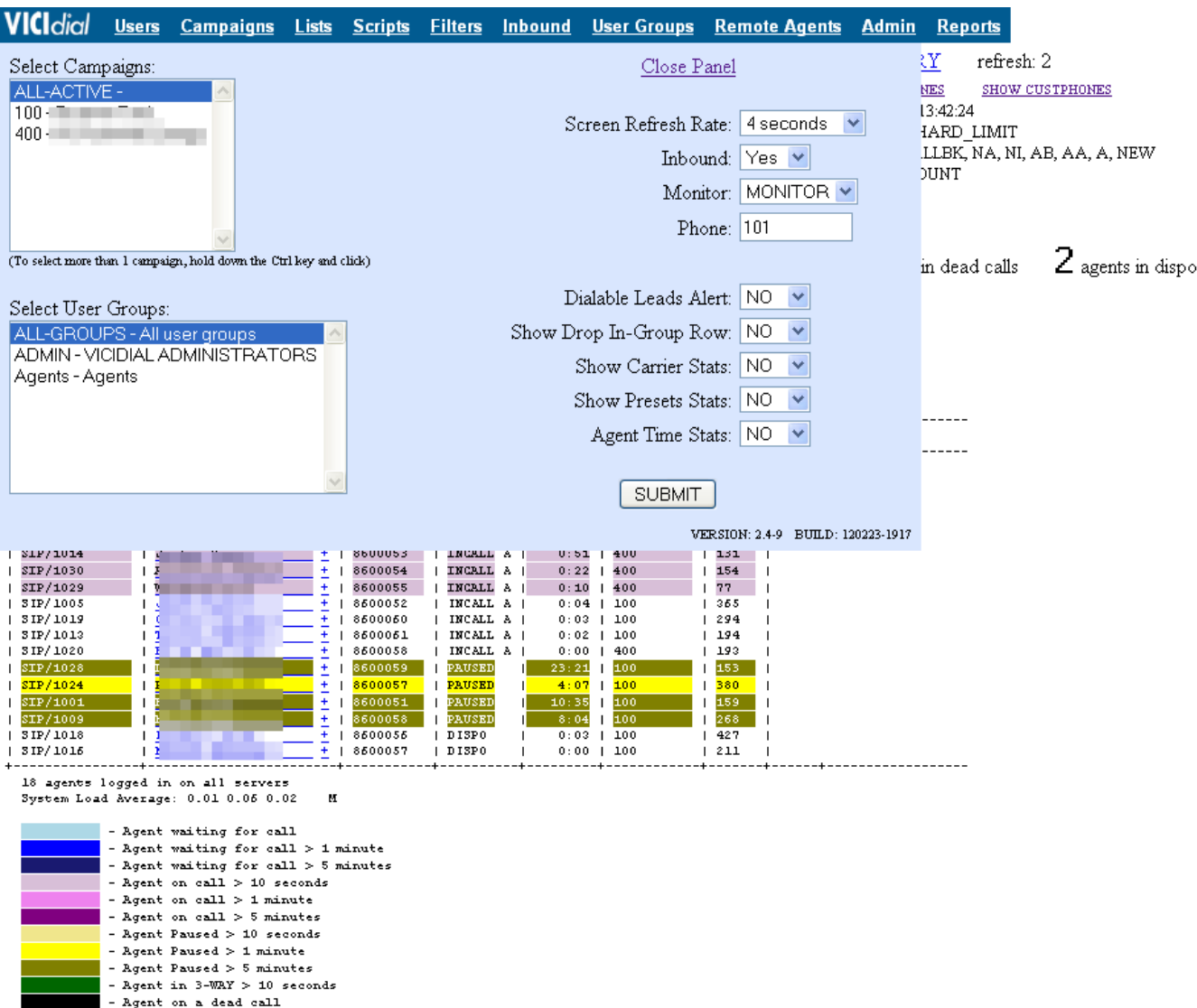


Figure 42. Live Monitoring using a phone entry from the Real-time report

REAL TIME MAIN REPORT – LIVE AUDIO MONITORING

Also available from the “Choose Report Display options” is the ability to live monitor or barge into agent calls. From the Monitor pulldown select either MONITOR or BARGE. In the phone field below, indicate the phone extension you will be listening from, and click “submit”. You will now be back at the Real Time report screen and each agent will have a “LISTEN” link to the right of their names. Click to LISTEN to the agent and it will ring your phone with a blind monitored session on the phone. See Tutorial Q for an example of how to set this up and use it with a mobile cellphone.

REAL TIME MAIN REPORT – ALL CAMPAIGNS SUMMARY

This report is basically the top summary section of the Real-time Time-on-VDAD report for all active campaigns on the system put into a single page without specific agent or specific call information. The name of each campaign in the report is also a link to go to its own Real-time Campaign report. There is also a Modify link that will go to the Campaign modification page for that campaign.

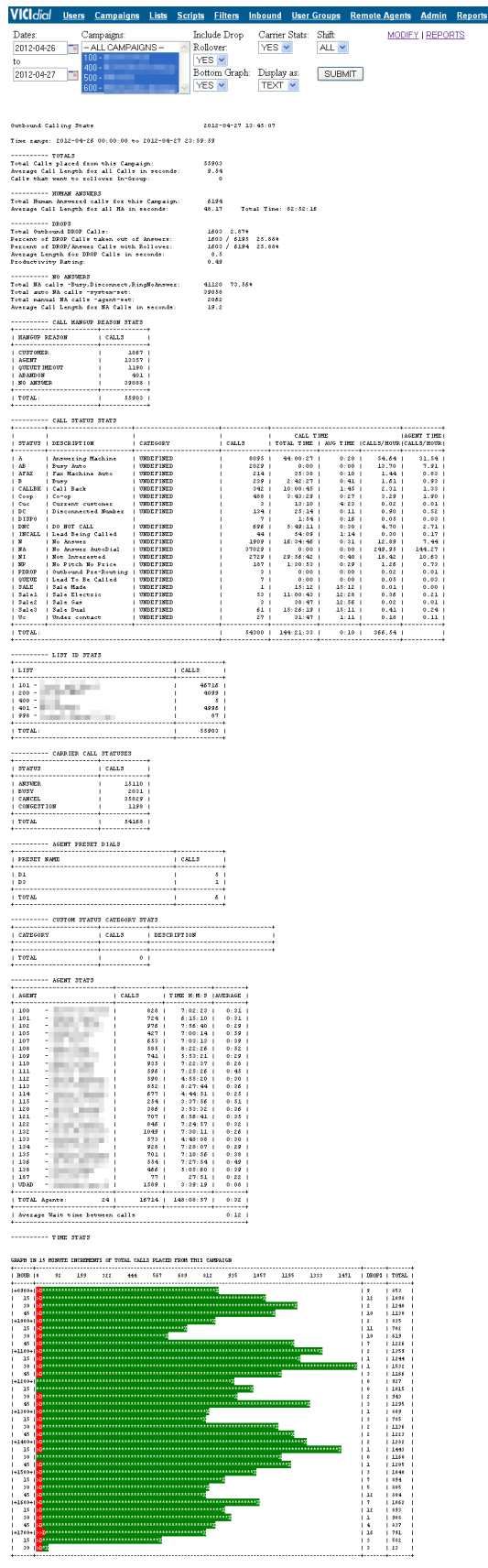


Figure 43. VDAD Outbound Report

VDAD OUTBOUND REPORT

The VDAD(VICIdial Auto-Dialer) Report is a summary of the outbound dialing for the day for a specific campaign or set of campaigns. The first section contains the number of calls placed for this campaign for a specific day along with the average length of a call.

The next section is the number of dropped calls, the average length of a dropped call and the percentage of dropped calls out of the number of answered calls for the campaign for the day. Also included in this section is the total of calls answered when the Drop Rollover group for the campaign is included in the statistics.

The third section is the total number of no-Answer calls(ring-no-answer, busy, disconnect, invalid, ... [the statuses in the NA grouping depends on the kind of outside lines you have]) and the percentage of NAs of the total number of calls placed for the day.

The fourth section shows who hung up the phone when it went on-hook, or in the case of calls that were never answered it will show the reason that the call was terminated such as for outbound, NO ANSWER and for inbound, ABANDON and QUEUE TIMEOUT.

The fifth section shows details about the statuses of the dispositioned calls within the selected campaigns. You can see the description, number of calls and the total time and average time of those calls totaled for each status.

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

The seventh section shows the carrier call termination codes for calls placed. This can sometimes help to diagnose problems with your carrier, if for instance you have a large number of CONGESTIONS.

The eighth section shows the totals for any status categories that you may have set up in the system.

Next is the user section that shows the user IDs and names of all of the agents that took calls in this campaign for this day. This will show the number of calls and total talk time of the calls along with their average talk time for the day per call. At the bottom of this section is also the average time in between calls.

The last section is an ASCII time graph of the number of calls dialed broken down into 15 minute increments. This shows the calls placed in each 15 minute period(in green) along with the number of dropped calls for each 15 minute period(in red) for the entire day during which calls were placed.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

VICIdial OUTBOUND INTERVAL REPORT

The VICIdial Outbound Interval Report gives you a different set of statistics than the general Outbound report, and it also can break down the statistics into 15 minute, 30 minute or 1 hour intervals to view. Also, the results can be filtered by a call time scheme so you can see your totals only for a specific time period during the day.

The first section is a basic totals overview for each selected campaign and a grand total with all selected campaigns. The System Release calls are calls that never make it to an agent, and are dispositioned by the system.

The next sections are a breakdown per campaign by the selected interval of the calling activity during each interval.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

Date Range: 2010-01-11 to 2010-01-11

Campaigns: -- ALL CAMPAIGNS --
 SALES - Sales Outbound
 TESTCAMP - Test Campaign

Include Drop: MODIFY | REPORTS

Rollover: YES

Call Time: 24 hours - default 24 hours calling

Time Interval: 30 Minutes

SUBMIT

Outbound Summary Interval Report: [LATEDES|Plan] 2010-01-12 05:54:37

----- MULTI-CAMPAIGN BREAKDOWN:

	TOTAL	SYSTEM	AGENT	SALE	DWC	NO	AGENT	AGENT
	CALLS	RELEASE	RELEASE	CALLS	CALLS	ANSWER	DROP	LOGIN
SALES - Sales Outbound	3522	2141	1361	0	0	58.32%	2.39%	25:02:50
TESTCAMP - Test Campaign	1761	1116	645	0	0	61.84%	1.42%	15:19:27
TOTALS	5283	3257	2026	0	0	59.49%	2.06%	40:22:17

----- SALES - Sales Outbound INTERVAL BREAKDOWN:

INTERVAL	TOTAL	SYSTEM	AGENT	SALE	DWC	NO	AGENT	AGENT
	CALLS	RELEASE	RELEASE	CALLS	CALLS	PERCENT	PERCENT	TIME (H:M:S)
000	0	0	0	0	0	0.00%	0.00%	0:00
020	0	0	0	0	0	0.00%	0.00%	0:00
100	0	0	0	0	0	0.00%	0.00%	0:00
120	0	0	0	0	0	0.00%	0.00%	0:00
200	0	0	0	0	0	0.00%	0.00%	0:00
220	0	0	0	0	0	0.00%	0.00%	0:00
300	0	0	0	0	0	0.00%	0.00%	0:00
320	0	0	0	0	0	0.00%	0.00%	0:00
400	0	0	0	0	0	0.00%	0.00%	0:00
420	0	0	0	0	0	0.00%	0.00%	0:00
500	0	0	0	0	0	0.00%	0.00%	0:00
520	0	0	0	0	0	0.00%	0.00%	0:00
600	0	0	0	0	0	0.00%	0.00%	0:00
620	0	0	0	0	0	0.00%	0.00%	0:00
700	0	0	0	0	0	0.00%	0.00%	0:00
720	0	0	0	0	0	0.00%	0.00%	0:00
800	0	0	0	0	0	0.00%	0.00%	0:00
820	347	232	115	0	0	64.55%	2.21%	2:07:06
900	460	274	186	0	0	55.87%	3.70%	2:55:04
920	494	296	198	0	0	58.10%	2.22%	2:59:27
1000	547	319	228	0	0	56.67%	1.65%	3:01:07
1020	305	173	132	0	0	55.88%	1.64%	3:04:00
1100	552	353	199	0	0	61.23%	2.26%	3:12:32
1120	552	325	227	0	0	55.88%	2.71%	3:21:46
1200	262	166	96	0	0	61.07%	2.29%	4:11:18
1220	0	0	0	0	0	0.00%	0.00%	0:00
1200	2	1	1	0	0	50.00%	0.00%	0:00
1220	0	0	0	0	0	0.00%	0.00%	0:00
1400	0	0	0	0	0	0.00%	0.00%	0:00
1420	0	0	0	0	0	0.00%	0.00%	0:00
1500	0	0	0	0	0	0.00%	0.00%	0:00
1520	0	0	0	0	0	0.00%	0.00%	0:00
1600	0	0	0	0	0	0.00%	0.00%	0:00
1620	0	0	0	0	0	0.00%	0.00%	0:00
1700	0	0	0	0	0	0.00%	0.00%	0:00
1720	0	0	0	0	0	0.00%	0.00%	0:00
1800	0	0	0	0	0	0.00%	0.00%	0:00
1820	0	0	0	0	0	0.00%	0.00%	0:00
1900	0	0	0	0	0	0.00%	0.00%	0:00
1920	0	0	0	0	0	0.00%	0.00%	0:00
2000	0	0	0	0	0	0.00%	0.00%	0:00
2020	0	0	0	0	0	0.00%	0.00%	0:00
2100	0	0	0	0	0	0.00%	0.00%	0:00
2120	0	0	0	0	0	0.00%	0.00%	0:00
2200	0	0	0	0	0	0.00%	0.00%	0:00
2220	0	0	0	0	0	0.00%	0.00%	0:00
2300	0	0	0	0	0	0.00%	0.00%	0:00
2320	0	0	0	0	0	0.00%	0.00%	0:00
TOTALS	3522	2141	1361	0	0	58.32%	2.39%	25:02:50

----- TESTCAMP - Test Campaign INTERVAL BREAKDOWN:

INTERVAL	TOTAL	SYSTEM	AGENT	SALE	DWC	NO	AGENT	AGENT
	CALLS	RELEASE	RELEASE	CALLS	CALLS	PERCENT	PERCENT	TIME (H:M:S)
000	0	0	0	0	0	0.00%	0.00%	0:00
020	0	0	0	0	0	0.00%	0.00%	0:00
100	0	0	0	0	0	0.00%	0.00%	0:00
120	0	0	0	0	0	0.00%	0.00%	0:00
200	0	0	0	0	0	0.00%	0.00%	0:00
220	0	0	0	0	0	0.00%	0.00%	0:00
300	0	0	0	0	0	0.00%	0.00%	0:00
320	0	0	0	0	0	0.00%	0.00%	0:00
400	0	0	0	0	0	0.00%	0.00%	0:00
420	0	0	0	0	0	0.00%	0.00%	0:00
500	0	0	0	0	0	0.00%	0.00%	0:00
520	0	0	0	0	0	0.00%	0.00%	0:00
600	0	0	0	0	0	0.00%	0.00%	0:00
620	0	0	0	0	0	0.00%	0.00%	0:00
700	0	0	0	0	0	0.00%	0.00%	0:00
720	0	0	0	0	0	0.00%	0.00%	0:00
800	0	0	0	0	0	0.00%	0.00%	0:00
820	0	0	0	0	0	0.00%	0.00%	0:00
900	0	0	0	0	0	0.00%	0.00%	0:00
920	0	0	0	0	0	0.00%	0.00%	0:00
1000	0	0	0	0	0	0.00%	0.00%	0:00
1020	0	0	0	0	0	0.00%	0.00%	0:00
1100	0	0	0	0	0	0.00%	0.00%	0:00
1120	0	0	0	0	0	0.00%	0.00%	0:00
1200	0	0	0	0	0	0.00%	0.00%	0:00
1220	0	0	0	0	0	0.00%	0.00%	0:00
1300	0	0	0	0	0	0.00%	0.00%	0:00
1320	0	0	0	0	0	0.00%	0.00%	0:00
1400	0	0	0	0	0	0.00%	0.00%	0:00
1420	0	0	0	0	0	0.00%	0.00%	0:00
1500	0	0	0	0	0	0.00%	0.00%	0:00
1520	0	0	0	0	0	0.00%	0.00%	0:00
1600	0	0	0	0	0	0.00%	0.00%	0:00
1620	311	181	130	0	0	55.95%	2.25%	2:32:16
1700	296	167	129	0	0	54.73%	1.35%	2:07:24
1720	220	135	85	0	0	59.55%	1.82%	1:37:09
1800	195	114	81	0	0	57.44%	2.03%	1:28:22
1820	98	61	37	0	0	59.18%	3.06%	1:51:49
1900	158	111	47	0	0	69.62%	0.63%	1:34:07
1920	192	139	53	0	0	72.40%	0.00%	1:29:21
2000	259	187	72	0	0	70.66%	1.16%	1:32:22
2020	32	21	11	0	0	62.50%	3.12%	44:27
2100	0	0	0	0	0	0.00%	0.00%	0:00
2120	0	0	0	0	0	0.00%	0.00%	0:00
2200	0	0	0	0	0	0.00%	0.00%	0:00
2220	0	0	0	0	0	0.00%	0.00%	0:00
2300	0	0	0	0	0	0.00%	0.00%	0:00
2320	0	0	0	0	0	0.00%	0.00%	0:00
TOTALS	1761	1116	645	0	0	61.84%	1.42%	15:19:27

Run Time: 4 seconds

Figure 45. Outbound IVR Report

VICIdial OUTBOUND IVR REPORT

This report displays outbound IVR (Call Menu) & Queue statistics. The Outbound IVR work specifically with survey type campaigns. The report provides totals to calls taken, calls without caller ID, and total unique calls. The grid report breaks down your call totals based on the call path, or route the caller takes through the IVR. The report shows total calls, queue calls, drops, dropped percentage, average IVR time, and average total time, per call path.

Date Range: 2012-04-26 to 2012-04-27

Shift: ALL

Display as: TEXT

SUBMIT

[MODIFY](#) | [IVR REPORT](#) | [REPORTS](#)
Inbound Call Stats: (70) 2012-04-27 14:00:41 [DOWNLOAD](#)

Time range: 2012-04-26 00:00:00 to 2012-04-27 23:59:59

----- TOTALS -----

Total calls taken in to this In-Group: 255

Average Call Length for all Calls: 322 seconds

Answered Calls: 249 98%

Average Queue time for Answered Calls: 0.29 seconds

Calls taken into the IVR for this In-Group: 0

----- DROPS -----

Total DROP Calls: 6 2%

Average hold time for DROP Calls: 10 seconds

drop/answered: 2%

----- CUSTOM INDICATORS -----

GDE (Answered/Total Calls taken in to this In-Group): 98%

ACR (Dropped/Answered): 2%

TWER (Answered within 20 seconds/Answered): 100%

TWER (Answered within 30 seconds/Answered): 100%

----- QUEUE STATS -----

Total Calls That entered Queue: 19 7%

Average QUEUE Length for queue calls: 6.97 seconds

Average QUEUE Length across all calls: 0.52 seconds

----- CALL HOLD TIME BREAKDOWN IN SECONDS ----- [DOWNLOAD](#)

	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
	1	236	11	2	2	3	1	0	0	0	0	0	0	0	0	255

----- CALL DROP TIME BREAKDOWN IN SECONDS -----																
	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	
	2	0	1	0	2	0	0	0	0	0	0	0	0	0	0	
	2	0	1	0	2	0	0	0	0	0	0	0	0	0	0	
																6

----- CALL ANSWERED TIME AND PERCENT BREAKDOWN IN SECONDS -----

	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
INTERVAL	1	204	11	1	2	1										249
CUMULATIVE	1	224	44	54	54	54	54	54	54	54	54	54	54	54	54	249
CUM %	1	92%	94%	97%	97%	97%	98%	98%	98%	98%	98%	98%	98%	98%	98%	1
CUM AND %	1	94%	98%	99%	99%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	1

----- CALL HANDUP REASON STATS ----- [DOWNLOAD](#)

REASON	CALLS
CALLER	47
AGENT	202
ABANDON	2
NONE	2
TOTAL	255

----- CALL STATUS STATS ----- [DOWNLOAD](#)

STATUS	DESCRIPTION	CATEGORY	CALLS	TOTAL TIME	Avg TIME (CALLS/HOUR)
A	Answering Machine	001	9	21.20	0.30
B	Busy	002	1	0.50	0.04
CALLER	Call Back	001	13	1.46:00	6.97
CHRT	CLOSER NO SALE NOT	001	5	1.19:18	9.52
DNC	DO NOT CALL	002	9	26.35	2.87
DSRE	DOES NOT SPEAK ENGLI	001	1	0.42	0.04
DRDP	Agent Not Available	001	6	1.01	0.30
HasEx	Already Had Ex	001	8	20.10	2.51
IMCALL	Lead Being Called	002	5	31.55	6.32
W	No Answer	001	6	0.39	0.07
NI	Not Interested	001	141	11.15:44	4.80
NP	No Pitch No Price	001	2	6.18	2.06
NSAEE	NO SALE AFFORDABILITY	001	5	17.13	3.27
NSPps	NO SALE - Spousal	001	1	6.29	6.29
SALE	Sale Made	001	25	6.26:39	15.28
TDRDP	Xfer to T.O. call Br	001	1	0.09	0.09
XFER	Call Transferred	001	8	35.50	5.56
TOTAL			255	22:47:02	5.22

----- CUSTOM STATUS CATEGORY STATS ----- [DOWNLOAD](#)

CATEGORY	DESCRIPTION	CALLS
001	117 CONTACT	117
002	30 NO CONTACT	30
TOTAL		247

----- CALL INITIAL QUEUE POSITION BREAKDOWN ----- [DOWNLOAD](#)

	1	2	3	4	5	6	7	8	9	10	15	20	25	+25	TOTAL
	1	235													235

----- AGENT STATS ----- [DOWNLOAD](#)

AGENT	CALLS	TIME H:M:S	AVERAGE
1002	66	6:44:02	6:07
1003	22	2:40:52	7:19
1006	4	1:00	0.15
1007	6	22:02	3:40
1009	7	32:10	7:27
1010	1	1:57	1:57
1014	50	6:20:00	7:52
1015	2	7:42	2:24
1019	12	1:23:46	6:59
1022	3	3:20	1:07
1026	6	40:40	9:07
1037	7	21:01	3:00
1042	84	2:47:04	2:27
UNCL	1	0:19	0:19
TOTAL Agents	14	22:47:02	5:25

----- TIME STATS ----- [DOWNLOAD](#)

AGENT	CALLS	TIME H:M:S	AVERAGE
1002	66	6:44:02	6:07
1003	22	2:40:52	7:19
1006	4	1:00	0.15
1007	6	22:02	3:40
1009	7	32:10	7:27
1010	1	1:57	1:57
1014	50	6:20:00	7:52
1015	2	7:42	2:24
1019	12	1:23:46	6:59
1022	3	3:20	1:07
1026	6	40:40	9:07
1037	7	21:01	3:00
1042	84	2:47:04	2:27
UNCL	1	0:19	0:19
TOTAL Agents	14	22:47:02	5:25

GROUP IN 15 MINUTE INTERVALS OF TOTAL CALLS TAKEN INTO THIS IN-GROUP

GROUP	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	DROPS	TOTAL
1002	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1003	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1006	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1007	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1009	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1010	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1014	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1015	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1019	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1022	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1026	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1037	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1042	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
UNCL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
TOTAL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

----- CALL ANSWERED TIME BREAKDOWN IN SECONDS ----- [DOWNLOAD](#)

	0	5	10	15	20	25	30	35	40	45	50	55	60	90	+90	TOTAL
1002	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1003	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1006	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1007	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1009	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1010	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1014	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1015	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1019	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1022	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1026	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1037	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1042	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
UNCL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
TOTAL	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

Run Time: 0 seconds/0

Figure 46. Inbound Report

VICIdial INBOUND REPORT

The VDAD Closer Report has many of the same parts as the standard VDAD Outbound report except it is only for inbound groups, not for outbound calling. At the top of the Inbound report you will see a breakdown of the basic call handling stats across the multiple in-groups that you have selected to run the report on. Another difference from the outbound report is that the VDAD Closer Report also will show the Total and Average Queue time for calls, or how long the callers had to wait before they either hung up the phone or were sent to an agent.

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

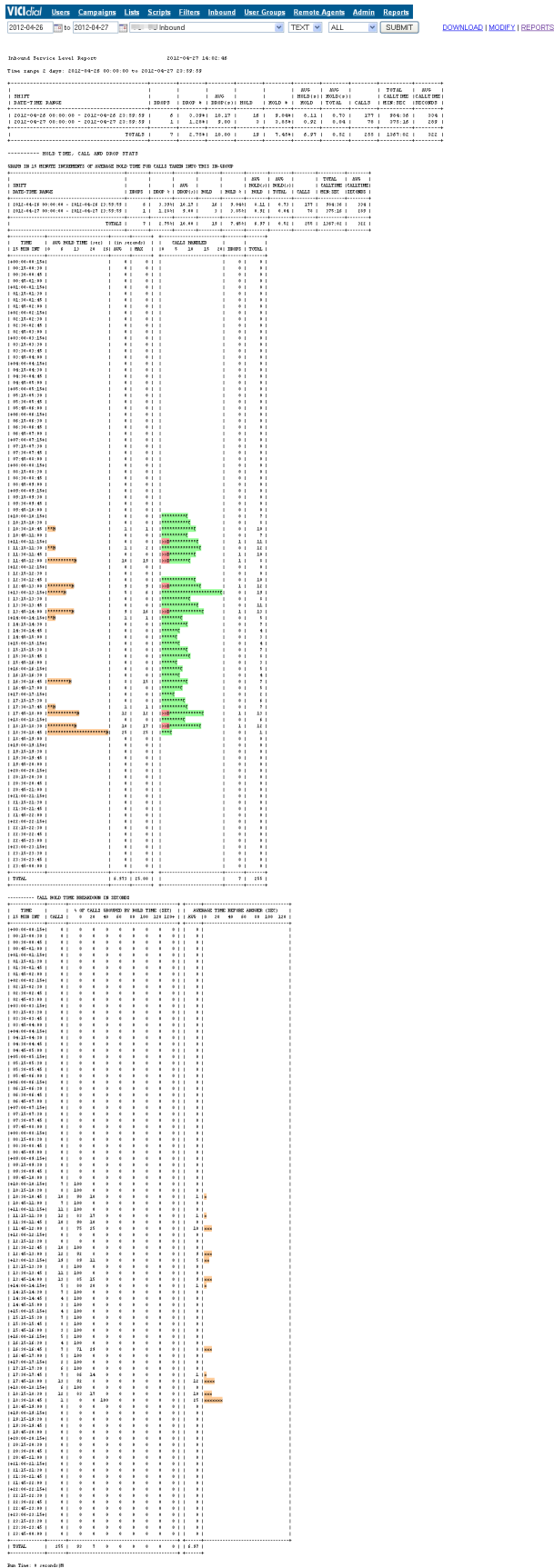
The next different inbound section will show you the breakdown in seconds of the hold and drop calls as to how long they were holding before they were answered or dropped.

The call answered time and percent breakdown will show you number of calls and percentage of calls broken down across the same time frame as the previous section.

Below the Custom Status breakdown is a chart showing tallies of the initial queue position of all calls in the selected in-groups when they came into the in-group queue. In the Figure above, this shows that five of the callers were fourth in line when they first entered the queue.

The last different inbound section is at the bottom and it is also using the same time breakdown as the sections I just mentioned, except it is a breakdown in 15 minute increments of the answered time of calls in the selected in-groups.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.



INBOUND/CLOSER SERVICE LEVEL REPORT

The inbound service level report is a report that has some of the information available in the standard inbound report, except it is in a different format. It also includes some new information.

This report can show you a breakdown per day of the basic call statistics for the selected in-group. You will also see much more information on hold times broken down across 15 minute increments in the two bottom sections of this report. This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

VICIdial [Users](#) [Campaigns](#) [Lists](#) [Scripts](#) [Filters](#) [Inbound](#) [User Groups](#) [Remote Agents](#) [Admin](#) [Reports](#)

Date Range:
2012-04-26 to 2012-04-27

Call Time:
9am-9pm - default 9am to 9pm calling

Inbound Groups:
AGENTDIRECT - Single Agent Direct Queue
Closers - Closers
Inbound

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Display as: TEXT
Exclude Outbound Drop Groups: NO
SUBMIT

Inbound Summary Hourly Report: [T0] 2012-04-27 14:04:39

----- MULTI-GROUP BREAKDOWN: -----

IN-GROUP	TOTAL CALLS	TOTAL ANSWER	TOTAL TALK	AVERAGE TALK	TOTAL QUEUE TIME	AVERAGE QUEUE TIME	MAXIMUM QUEUE TIME	TOTAL ABANDON
Inbound	255	248	22:40:42	5:29	2:13	0:01	0:25	7
TOTALS In-Groups: 1	255	248	22:40:42	5:29	2:13	0:01	0:25	7

----- HOURLY BREAKDOWN: -----

HOURLY	TOTAL CALLS	TOTAL ANSWER	TOTAL TALK	AVERAGE TALK	TOTAL QUEUE TIME	AVERAGE QUEUE TIME	MAXIMUM QUEUE TIME	TOTAL ABANDON
9	0	0	0:00	0:00	0:00	0:00	0:00	0
10	32	32	3:17:44	6:11	0:01	0:00	0:01	0
11	41	38	2:39:55	4:12	0:22	0:01	0:19	3
12	22	21	2:28:52	7:05	0:09	0:00	0:09	1
13	51	50	4:55:02	5:54	0:27	0:01	0:16	1
14	19	19	2:28:42	7:50	0:01	0:00	0:01	0
15	22	22	1:45:13	4:47	0:00	0:00	0:00	0
16	21	21	1:20:06	3:49	0:16	0:01	0:15	0
17	28	27	2:02:40	4:33	0:13	0:00	0:12	1
18	19	18	1:42:27	5:42	0:44	0:02	0:25	1
19	0	0	0:00	0:00	0:00	0:00	0:00	0
20	0	0	0:00	0:00	0:00	0:00	0:00	0
21	0	0	0:00	0:00	0:00	0:00	0:00	0
TOTALS	255	248	22:40:42	5:29	2:13	0:01	0:25	7

Run Time: 0 seconds [M]

Figure 48. Inbound Summary Hourly Report

INBOUND SUMMARY HOURLY REPORT

The Inbound Summary Hourly Report gives you an hour-by-hour breakdown of the call activity of a selected group of in-groups that can be filtered by a call time scheme. At the top you will see a breakdown per in-group of standard statistics for inbound call handling. Below that is a breakdown per in-group and per hour of the same statistics shown above. This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

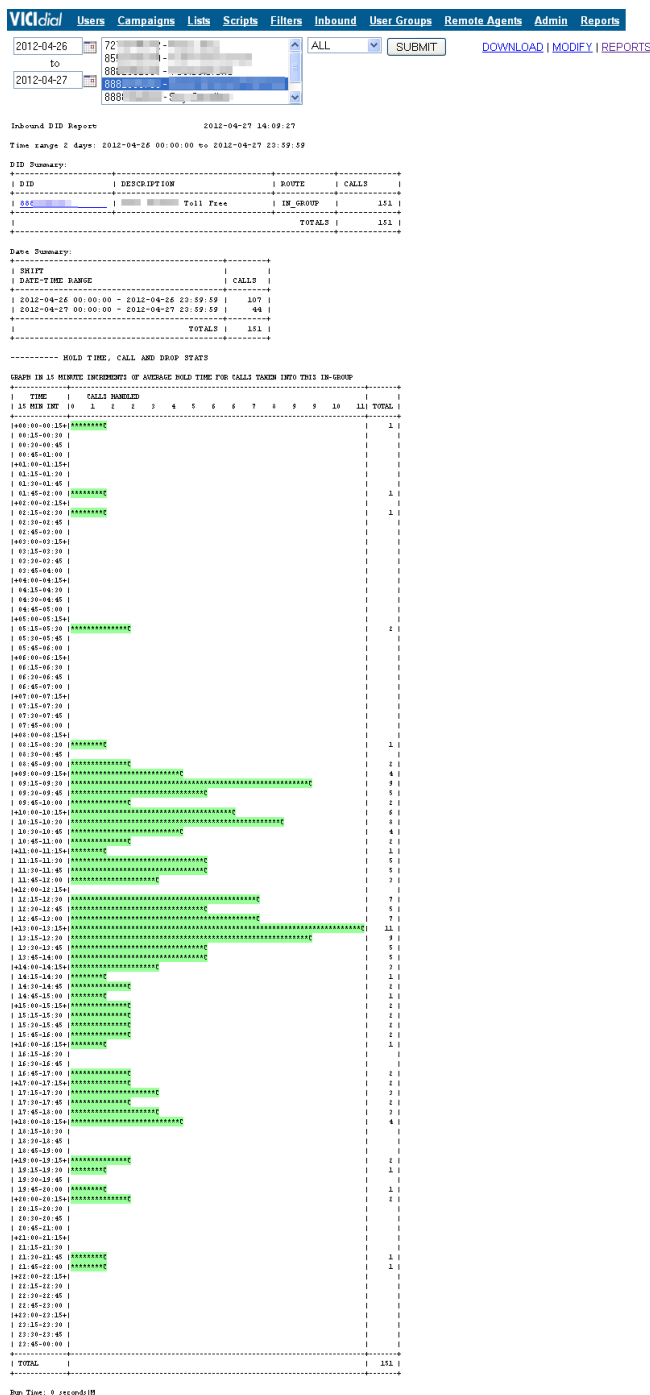


Figure 49. Inbound DID Report

INBOUND DID REPORT

The Inbound DID Report shows the statistics for calls passing through the VICIdial DID routing process. The first section of the report shows the breakdown per DID of how many calls came in during the specified date period. The next section is a day-by-day breakdown of the total calls for the selected DIDs. The last section is a 15-minute increment ASCII graph of the inbound call activity for those DIDs that shows when the calls came in during the day. This report can be exported to a spreadsheet capable .TXT document, by selecting the [DOWNLOAD](#) link.

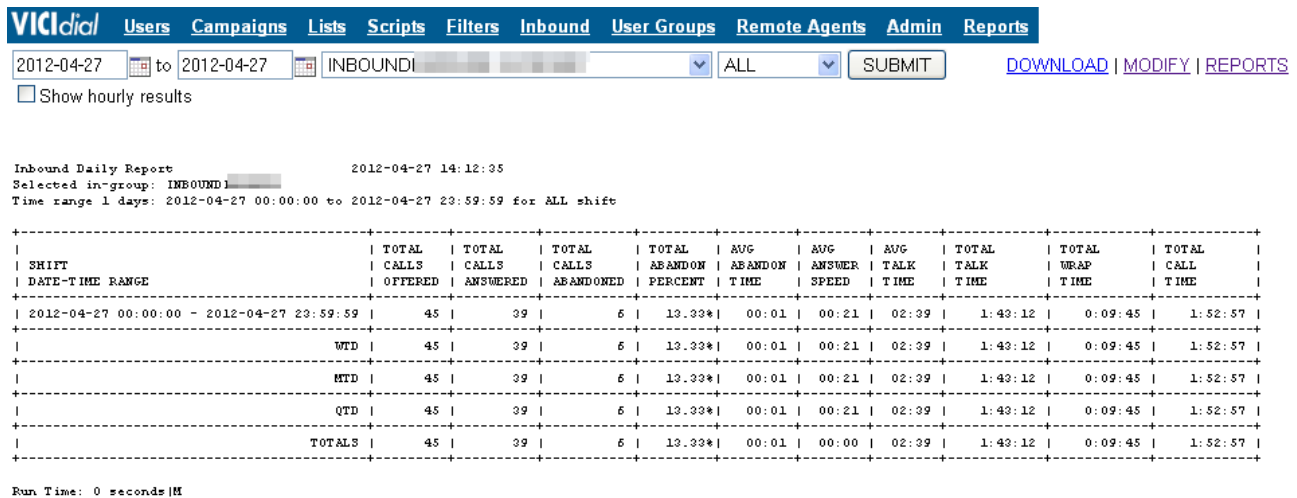


Figure 50. Inbound Daily Report

INBOUND DAILY REPORT

This report allows you to view 1 or several days worth of inbound information for a single campaign, and compare it against the week-to-date, month-to-date, and quarter-to-date statistics. This compares total calls offered, answered, and abandoned, as well as average abandon, answer speed, and talk time. This report also includes total talk, wrap, and call time. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

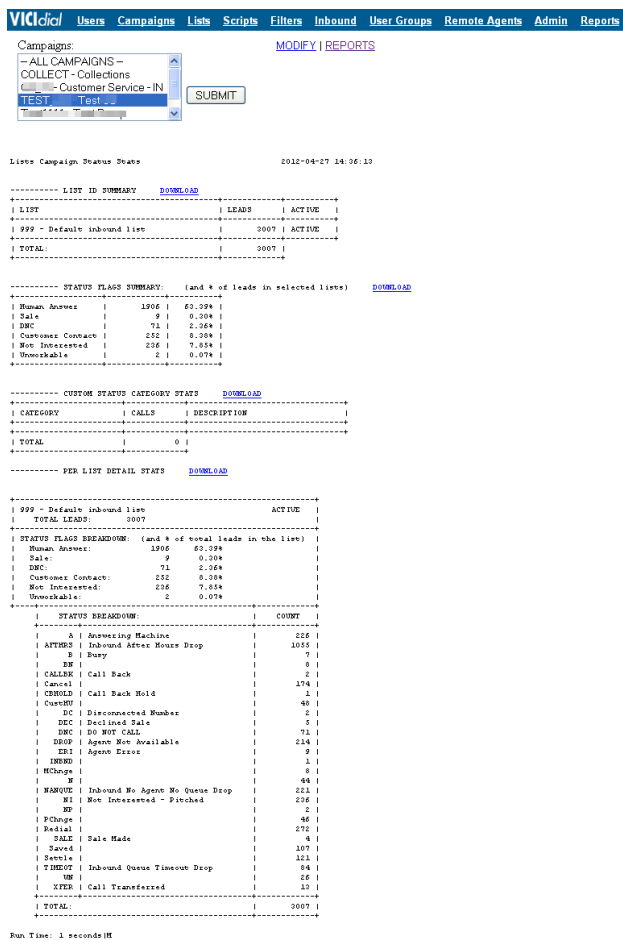
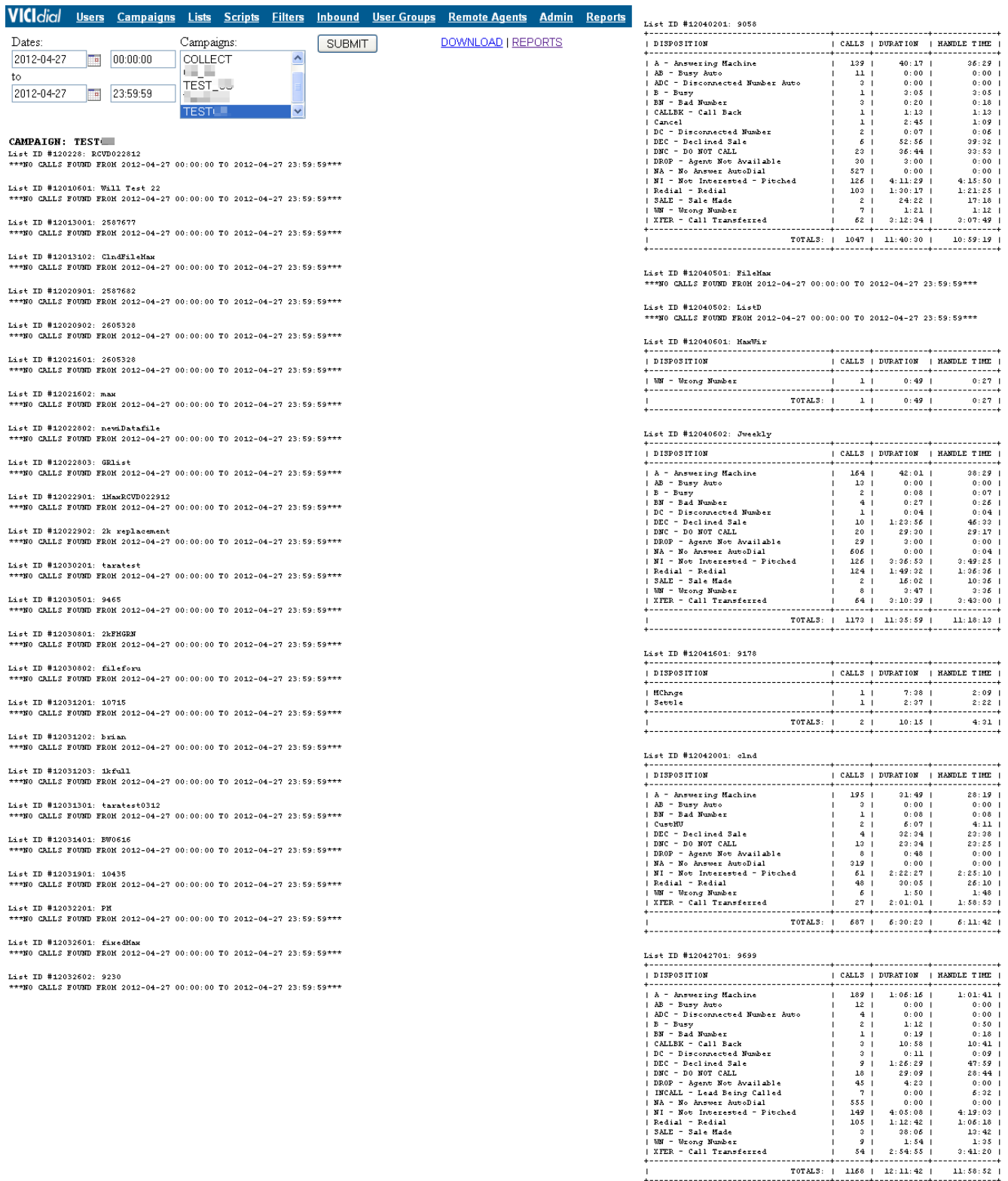


Figure 52. Lists Campaign Statuses Report

LISTS CAMPAIGN STATUSES REPORT

This report provides Various List specific information. LIST ID SUMMARY shows the total leads per list. STATUS FLAG SUMMARY shows a breakdown, by Status Flag, for the specified leads. PER LIST DETAIL STATS displays the Status Flag Summary and the status totals for each individual list. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.



calls, duration, and handle time. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

[illegible]

Figure 54. VICIdial Agent Performance Detail Report

AGENT PERFORMANCE DETAIL REPORT

The Agent Performance Detail Report is an accounting of an Agent's time for a pre-defined shift that they are logged into a campaign. In addition to a tally of statuses that each agent dispositioned, the Detail report shows Pause time, wait time and disposition time. Together with talk time this gives a full breakdown of all Agents' time on the campaign for that shift. Dead time is taken out of the talk time for an agent, since talk time is really counting the amount of time that the customer record is on the agent's screen, not the phone call connected time. To get that number you need to take the talk time and subtract the dead time from it. The AM shift is coded as 3:00 AM to 5:45 PM server time while the PM shift is from 5:45 PM to 11:59 PM. You can also select the entire day and narrow the results down by user group.

Also in the Performance Detail report is a section showing the break down of pause time for the agent when logged in to VICIdial. It is important to note that the total time in calls can be different from the total time an agent is logged in, the first section of this report will only show time associated with calls, not total time an agent is logged in like the second section shows.

This report can be exported to a spreadsheet capable .TXT document, by selecting the **DOWNLOAD** link.

VICIdial Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin Reports																	
Dates:		Campaigns:		Team/User Groups:													
Date Range:	2012-04-27	to	2012-04-27	00:00:00	23:59:59												
--- TEAM: ADMIN - VICIDIAL ADMINISTRATORS																	
Agent Name	Agent ID	Calls	Leads	Contacts	Contact Ratio	System Time	Talk Time	Sales	Sales to Leads Ratio	Sales to Contacts Ratio	Sales Per Hour	Incomplete Sales	Cancelled Sales	Callbacks	First Call Resolution	Average Sale Time	Average Contract Time
[REDACTED]	103	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	102	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	101	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
TOTALS	40	40	40	40	100.00%	4:00:00	4:00:00	0	0.00	0.00	0.00	0	0	0	0.99	6:15	2:04
--- TEAM: CLOSERS - CLOSERS																	
Agent Name	Agent ID	Calls	Leads	Contacts	Contact Ratio	System Time	Talk Time	Sales	Sales to Leads Ratio	Sales to Contacts Ratio	Sales Per Hour	Incomplete Sales	Cancelled Sales	Callbacks	First Call Resolution	Average Sale Time	Average Contract Time
[REDACTED]	114	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	113	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	112	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
TOTALS	30	30	30	30	100.00%	3:00:00	3:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
--- TEAM: SALES - SALES																	
Agent Name	Agent ID	Calls	Leads	Contacts	Contact Ratio	System Time	Talk Time	Sales	Sales to Leads Ratio	Sales to Contacts Ratio	Sales Per Hour	Incomplete Sales	Cancelled Sales	Callbacks	First Call Resolution	Average Sale Time	Average Contract Time
[REDACTED]	120	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	119	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
[REDACTED]	118	10	10	10	100.00%	1:00:00	1:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
TOTALS	30	30	30	30	100.00%	3:00:00	3:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
--- CALL CENTER TOTAL																	
Team Name	Team ID	Calls	Leads	Contacts	Contact Ratio	System Time	Talk Time	Sales	Sales to Leads Ratio	Sales to Contacts Ratio	Sales Per Hour	Incomplete Sales	Cancelled Sales	Callbacks	First Call Resolution	Average Sale Time	Average Contract Time
VICIDIAL ADMINISTRATORS	ADMIN	40	40	40	100.00%	4:00:00	4:00:00	0	0.00	0.00	0.00	0	0	0	0.99	6:15	2:04
CLOSERS	CLOSERS	30	30	30	100.00%	3:00:00	3:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
SALES	SALES	30	30	30	100.00%	3:00:00	3:00:00	0	0.00	0.00	0.00	0	0	0	1.00	0:00	0:00
TOTALS	100	100	100	100	100.00%	10:00:00	10:00:00	0	0.00	0.00	0.00	0	0	0	1.01	13:15	3:00

Figure 55. Team Performance Detail

TEAM PERFORMANCE DETAIL

Similar to the Agent Performance Detail Report, however this displays information for an entire User Group. This report can be exported to a spreadsheet capable .TXT document, by selecting the [DOWNLOAD](#) link.

VICIdial Users Campaigns Lists Scripts Filters Inbound User Groups Remote Agents Admin Reports																
Agent Time Detail		2012-04-27 14:55:30														
Time range: 2012-04-27 00:00:00 to 2012-04-27 23:59:59																
AGENT TIME BREAKDOWN:																
USER NAME	ID	CALLS	TIME CLOCK	AGENT TIME	WAIT	TALK	DISPO	PAUSE	DEAD	CUSTOMER	LOGIN					
[REDACTED]	103	125	0:00	4:15:01	50:59	2:50:11	18:32	15:19	1:56	2:48:15	0:38	14:41				
[REDACTED]	109	5	0:00	3:28:05	0:05	20:45	0:17	3:06:58	13:05	7:40	3:25	3:03:33				
[REDACTED]	102	106	0:00	3:41:17	34:02	1:51:57	23:46	51:32	5:18	1:46:39	0:59	50:53				
[REDACTED]	111	126	0:00	4:24:37	49:06	3:07:42	25:51	1:56	2:47	3:04:55	0:51	1:07				
[REDACTED]	102	16	0:00	4:42:21	33:40	1:05:55	4:57	2:57:49	0:26	1:05:29	0:14	2:57:35				
[REDACTED]	114	166	0:00	4:22:02	59:48	2:52:09	12:31	17:35	1:55	2:50:14	0:15	17:20				
[REDACTED]	104	5	0:00	4:12:01	0:31	18:10	10:48	3:42:32	0:03	18:07	0:00	3:42:32				
[REDACTED]	101	18	0:00	4:52:06	42:14	1:04:06	10:24	2:55:22	0:37	1:03:29	10:13	2:45:09				
TOTALS	AGENTS: 8	568	0:00	33:57:31	4:30:25	13:30:55	1:47:06	14:09:05	26:07	13:04:48	16:15	13:52:50				

Dates:

2012-04-27

to

 2012-04-27

Campaigns:

- ALL CAMPAIGNS -

COLLECT

User Groups:

- ALL USER GROUPS -

ADMIN

Closers

Shift:

ALL

SUBMIT

[DOWNLOAD](#) | [REPORTS](#)

M

Figure 56. VICIdial Agent Time Detail Report

AGENT TIME DETAIL REPORT

The Agent Time Detail Report brings together all of the time-related metrics for an agent's activity into a single report. From Timeclock clocked-in time, to agent activity Pause, Wait, Talk, Dispo and Dead time, as well as all paused time broken down into it's pause codes. This report can give you a better comparison tool of how an agent's time is being spent as compared to other agents. This report can be

exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

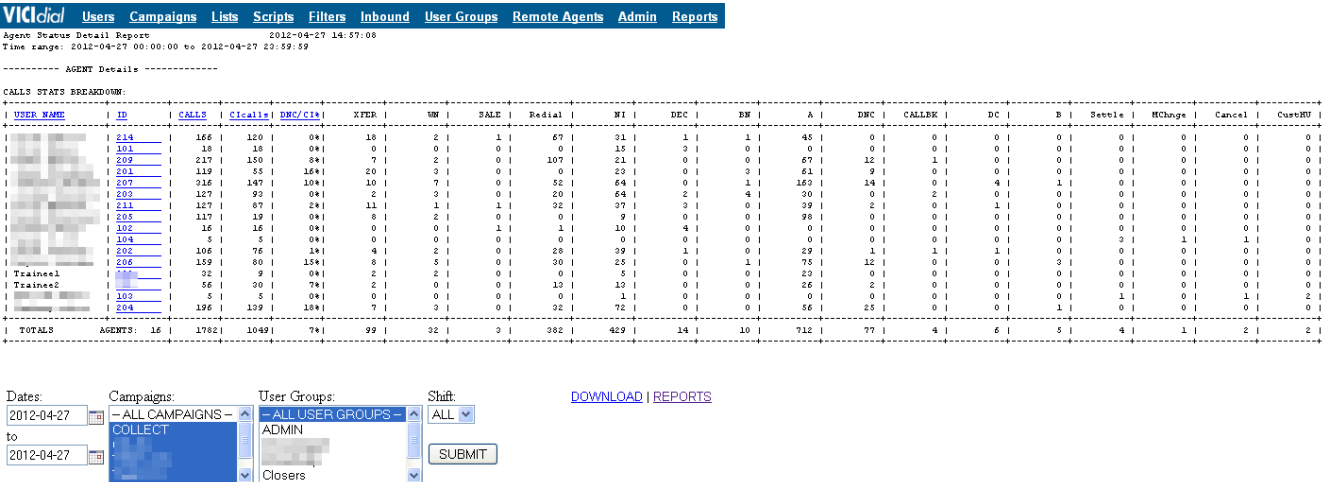
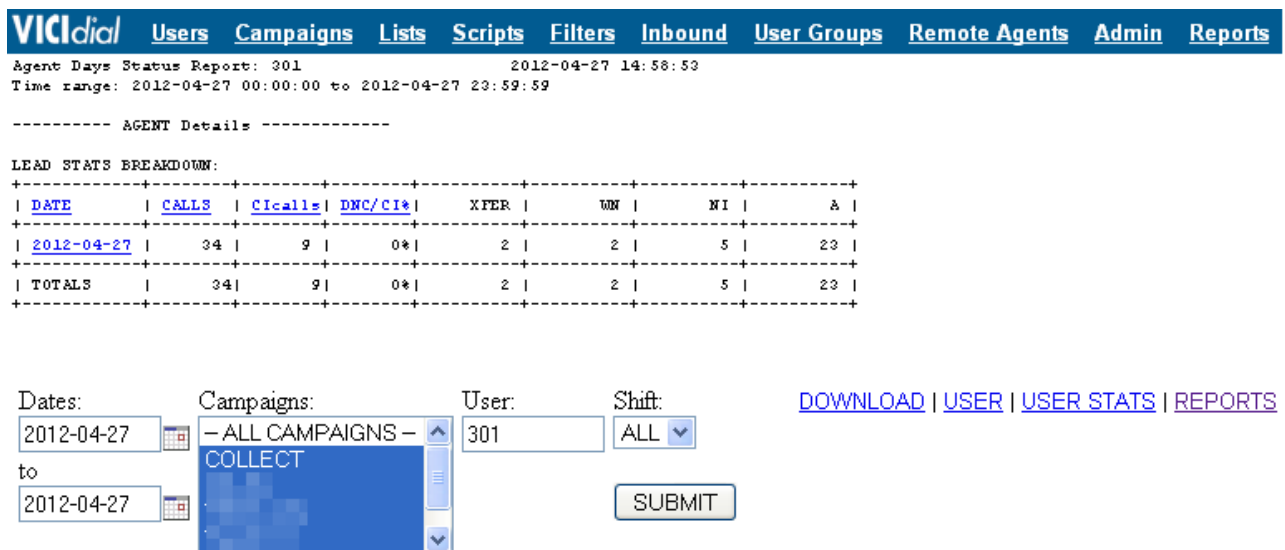


Figure 57. VICIdial Agent Status Detail Report

AGENT STATUS DETAIL

The Agent Status Detail report is similar to the agent performance detail report, except it will not show you any time associated with the agent activity. However it will show you a field that can be very useful in outbound campaigns, DNC/CI%(Do Not Call take out of Contacts percentage). This is a good way to see what agents are setting many more leads to DNC as compared to other agents. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a DOWNLOAD link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.



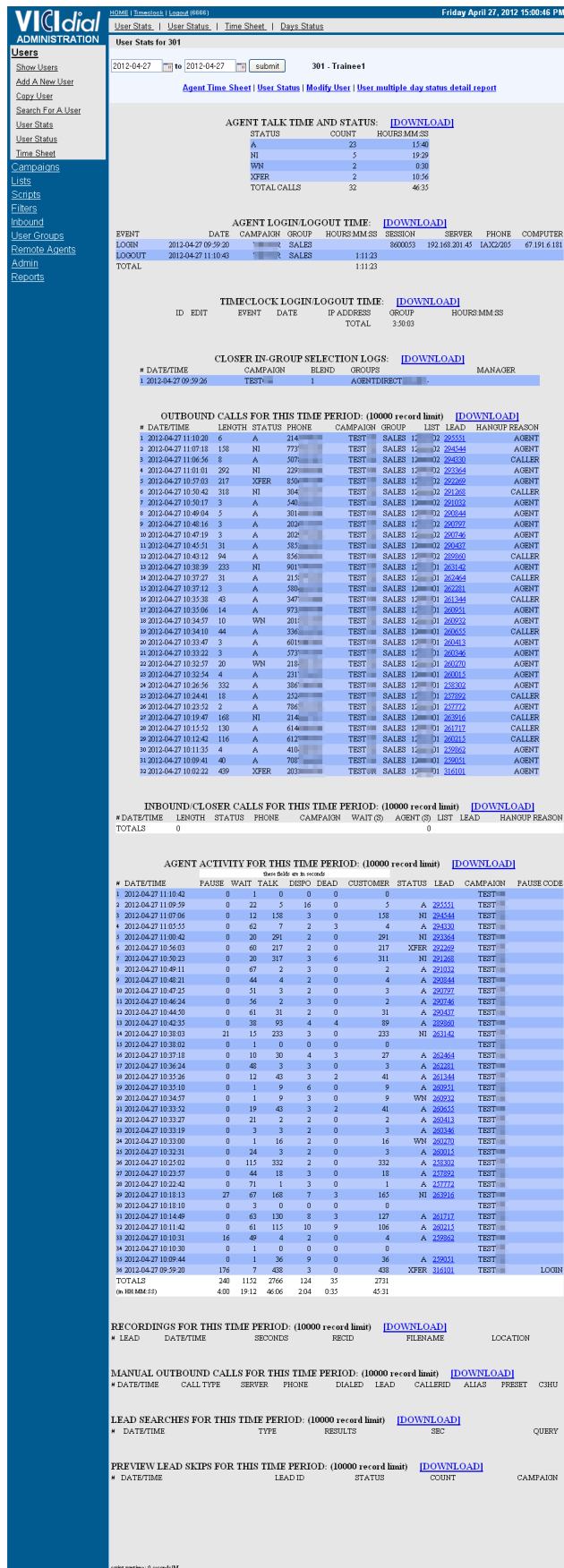
M
Figure 58. VICIdial Single Agent Daily Report

SINGLE AGENT DAILY DETAIL

The Agent daily detail report is a report for only one user that can show what that user has dispositioned calls per day as across a range of dates. This report has some clickable column headers that allow you to sort the data by the column you click on. There is a [DOWNLOAD](#) link available with this report that allows you to download the data that you see on your screen in a CSV format for import into the Spreadsheet or database program of your choice for display or manipulation.

FRONTER – CLOSER REPORT

This report can be useful if you have VICIdial agents sending calls to other VICIdial agents using the Local Closer option in the Agent interface and passing calls through in-groups. The report at the top will show the frontier statistics including the number of calls transferred, and out of those the number that became sales(Success%) as well as the other statuses that the calls ended up being dispositioned as. The bottom half of the report gives statistics on the Closer, or the agent that the call was sent to after the frontier. This section shows some additional information including the conversion percentage.



USER STATS

This page is a collection of the following reports: AGENT TALK TIME AND STATUS, AGENT LOGIN/LOGOUT TIME, TIMECLOCK LOGIN/LOGOUT TIME, CLOSER IN-GROUP SELECTION LOGS, OUTBOUND CALLS FOR THIS TIME PERIOD, INBOUND/CLOSER CALLS FOR THIS TIME PERIOD, AGENT ACTIVITY FOR THIS TIME PERIOD, RECORDINGS FOR THIS TIME PERIOD, MANUAL OUTBOUND CALLS FOR THIS TIME PERIOD, LEAD SEARCHES FOR THIS TIME PERIOD, PREVIEW LEAD SKIPS FOR THIS TIME PERIOD. They can be queried for one or a string of days. All reports on this page can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

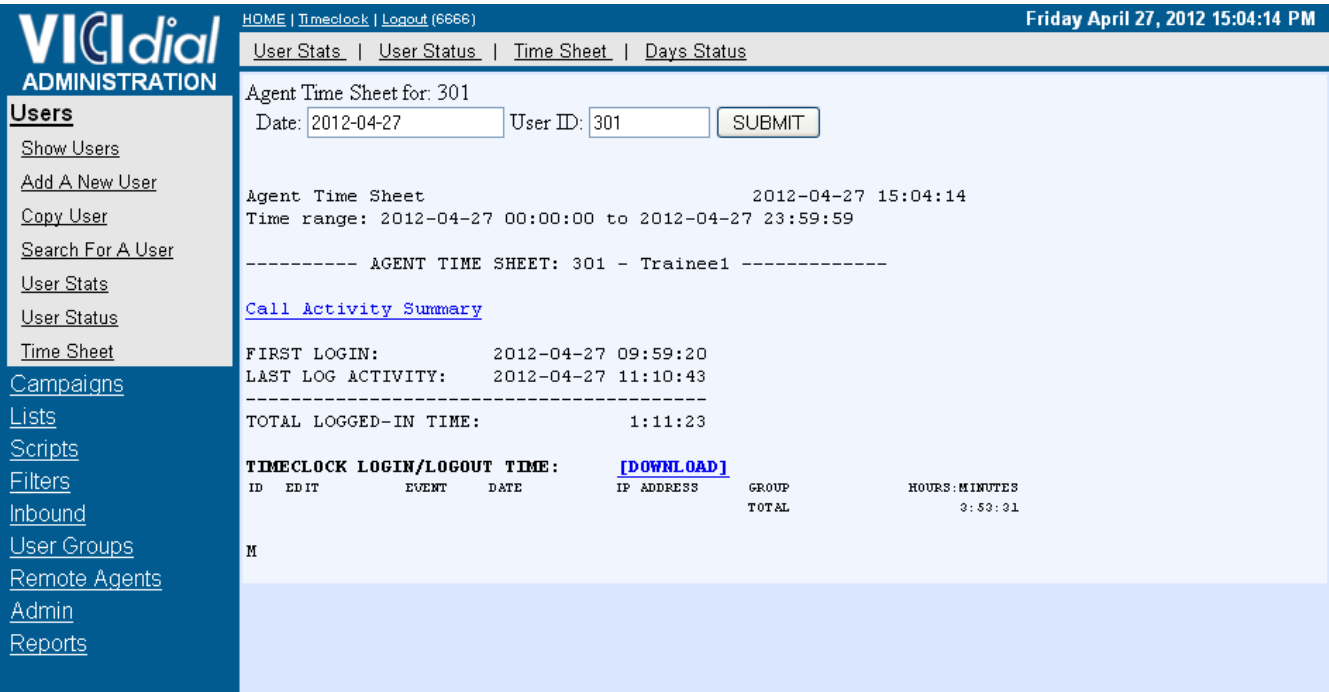


Figure 60. User Time Sheet

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. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

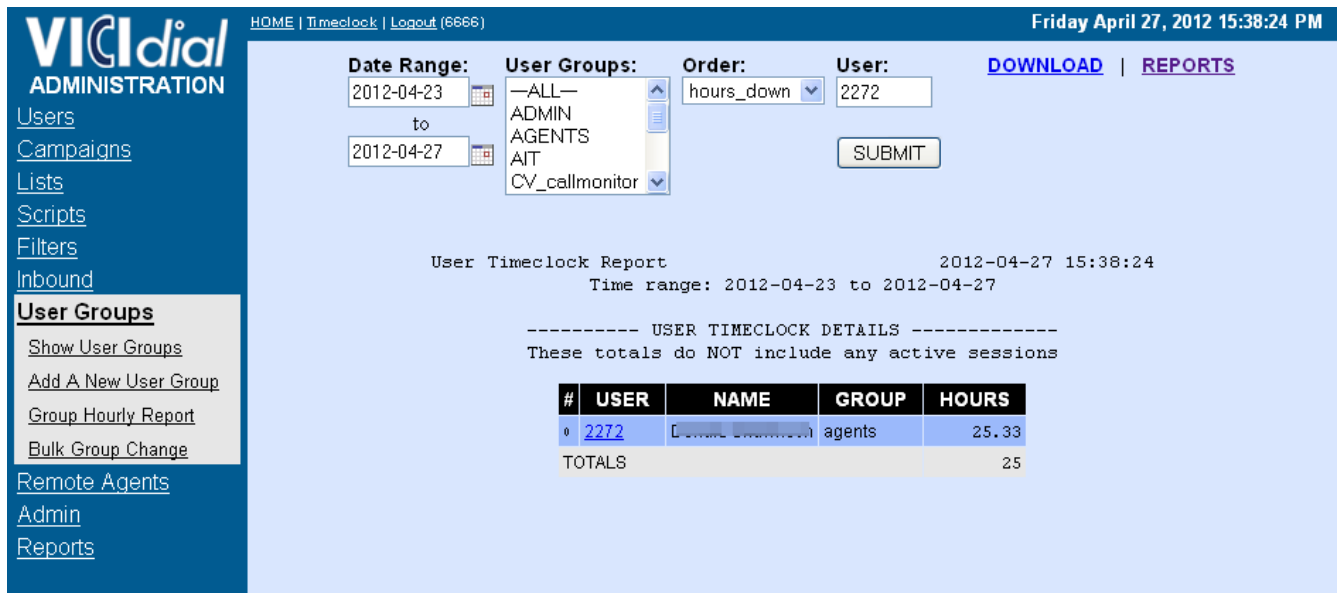


Figure 61. User Timeclock Report

USER TIMECLOCK REPORT

This report allows you to see timeclock data for one user or many users grouped by user group. It is important to note that this report will only use data from timeclock records that have been closed(records that contain a LOGOUT entry). You can sort this report by various fields and there will be a total at the bottom. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

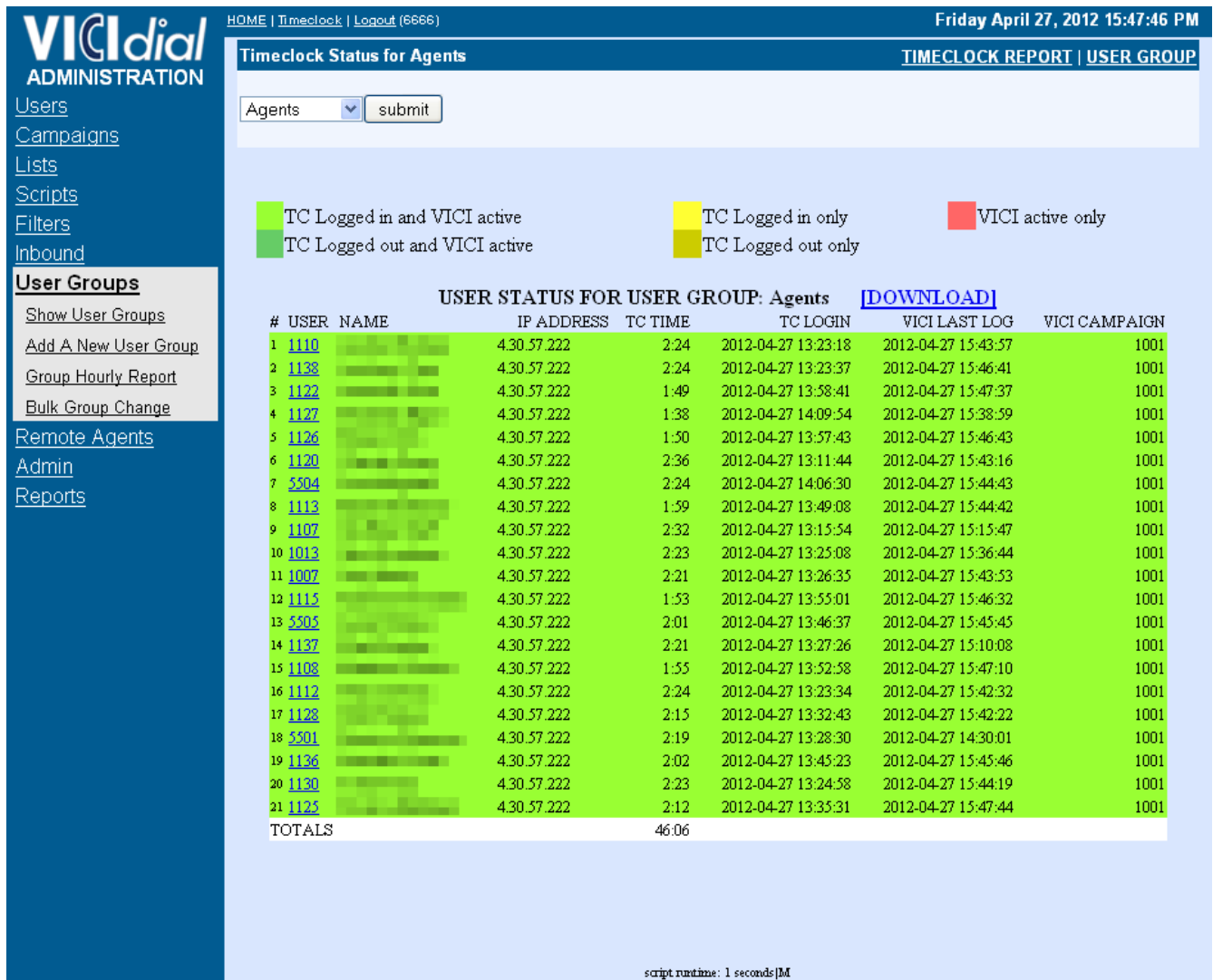


Figure 62. User Group Timeclock Status Report

USER GROUP TIMECLOCK STATUS REPORT

This is a current-day report that can show you by user group whether users are logged into the Timeclock and/or the VICIdial Agent interface. This is a good report to show a manager what agents need to log in or log out of the timeclock at the beginning or end of a shift.

User Time-Clock Detail 2012-04-27 15:42:52
Time range: 2012-04-26 00:00:00 to 2012-04-26 23:59:59

AGENT TIME-CLOCK DETAIL:

USER NAME	ID	USER GROUP	TIME CLOCK	TIME CLOCK PUNCHES
John Doe	007	ADMIN	12:19:23*	08:55:38 21:15:01*
John Doe	2028	RemoteAgents	11:39:58*	09:35:03 21:15:01*
John Doe	2041	agents	7:40:46	08:59:53 16:40:39
John Doe	2042	agents	11:28:17*	09:46:44 21:15:01*
John Doe	2054	AGENTS	7:39:17	08:53:22 16:32:39
John Doe	2069	AGENTS	7:40:58	08:51:52 16:32:50
John Doe	2074	agents	7:37:20	08:49:10 16:26:30
John Doe	2085	AGENTS	7:27:28	08:59:29 16:26:57
John Doe	2086	agents	7:32:12	08:59:41 16:31:53
John Doe	2120	agents	12:14:45*	09:00:16 21:15:01*
John Doe	2130	agents	7:33:28	08:54:43 16:28:11
John Doe	2138	M_Agent	4:32:38	16:30:51 21:03:29
John Doe	2144	agents	7:24:07	08:53:55 16:28:02
John Doe	2157	agents	7:27:01	09:02:01 16:29:02
John Doe	2165	agents	7:25:13	09:01:52 16:27:05
John Doe	2179	agents	5:31:08	10:54:53 16:26:01
John Doe	2185	AGENTS	7:30:50	08:59:12 16:30:02
John Doe	2191	agents	8:38:47*	09:11:11 15:07:36 18:32:39 21:15:01*
John Doe	2205	M_Agent	4:32:09	16:27:21 20:59:30
John Doe	2214	M_Agent	4:35:20	16:24:42 21:00:02
John Doe	2227	agents	7:42:02	08:47:52 16:29:54
John Doe	2228	agents	7:26:31	09:00:56 16:27:27
John Doe	2229	agents	7:24:55	08:52:09 16:27:04
John Doe	2231	AGENTS	7:24:29	09:01:58 16:26:27
John Doe	2239	agents	7:28:49	08:57:34 16:26:23
John Doe	2244	agents	7:40:51	08:45:32 16:26:23
John Doe	2254	M_Agent	4:26:30	16:31:13 20:57:43
John Doe	2272	agents	12:26:46*	08:48:15 21:15:01*
John Doe	2273	agents	7:31:06	08:58:26 16:29:32
John Doe	2275	agents	7:25:32	09:06:38 16:32:10
John Doe	2278	M_Agent	4:29:10	16:32:41 21:01:51
John Doe	2293	AGENTS	7:25:59	09:02:49 16:28:48
John Doe	2294	M_Agent	4:52:26*	16:22:35 21:15:01*
John Doe	2296	agents	12:13:52*	09:01:09 21:15:01*
John Doe	2298	AGENTS	12:15:40*	08:59:21 21:15:01*
John Doe	2300	AGENTS	7:32:43	09:00:16 16:32:59
John Doe	2301	agents	7:36:12	08:49:17 08:52:08 08:53:26 16:26:47
John Doe	2302	agents	7:38:53	08:49:25 09:00:12 09:01:18 16:29:24
John Doe	2304	AGENTS	12:12:11*	09:02:50 21:15:01*
John Doe	2305	agents	7:29:32	08:58:48 16:28:20
John Doe	2309	agents	7:30:20	08:57:01 16:27:21
John Doe	2310	M_Agent	4:27:40	16:29:14 20:56:54
John Doe	2311	M_Agent	4:52:20*	16:22:41 21:15:01*
John Doe	2312	M_Agent	4:24:40	16:32:17 20:56:57
TOTALS	AGENTS: 44		340:50:14	

* denotes AUTOLOGOUT from timeclock

Dates:

2012-04-26

00:00:00

User Groups:

- ALL USER GROUPS -

ADMIN
 AGENTS
 RemoteAgents
 AIT

Shift:

ALL

DOWNLOAD | [REPORTS](#)

SUBMIT

Figure 63. User Timeclock Detail Report

USER TIMECLOCK DETAIL REPORT

This report is queried by User Group, and displays time clock information for each user in the indicated group. It displays their User Name, User ID, User Group, Time Clock (or total time clocked in), and each time clock punch. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Friday April 27, 2012 15:10:52 PM

[Users](#)

[Campaigns](#)

[Lists](#)

[Show Lists](#)
[Add A New List](#)
[Search For A Lead](#)
[Add A New Lead](#)
[Add DNC Number](#)
[Load New Leads](#)
[List Custom Fields](#)
[Copy Custom Fields](#)

[Scripts](#)

[Filters](#)

[Inbound](#)

[User Groups](#)

[Remote Agents](#)

[Admin](#)

[Reports](#)

Export Calls Report

Date Range:

2012-04-27
to
2012-04-27

Header Row:

YES

Recording Fields:

NONE

Custom Fields:

NO

Per Call Notes:

NO

Export Fields:

EXTENDED

Campaigns:

---NONE---

1000

Inbound Groups:

---NONE---

AGENTDIRECT

Lists:

---ALL---

998

999

Statuses:

MLINAT

N

NA

NANQUE

NEW

NI

NP

PDROP

PM

PU

QUEUE

QVMail

RQXFER

SALE

SVYCLM

SVYEXT

SVYHU

SVYREC

SVYVM

TIMEOT

User Groups:

---ALL---

ADMIN

AGENTS

SUBMIT

Figure 64. Calls Export Report

EXPORT CALLS REPORT

This utility allows you to export call activity records and lead information from the database by selecting the date range, campaigns, in-groups, list Ids, user groups and statuses that you want to export. The file that is exported is in a tab-delimited text file format. The link to this report is only enabled if you have the Export Report user option set to 1. The fields that are exported are the following:

```
call_date,phone_number,status,user,full_name,campaign_id/in-
group,vendor_lead_code,source_id,list_id,gmt_offset_now,phone_code,phone_nu
mber,title,first_name,middle_initial,last_name,address1,address2,address3,c
ity,state,province,postal_code,country_code,gender,date_of_birth,alt_phone,
email,security_phrase,comments,length_in_sec,user_group,alt_dial/queue_seco
nds,rank,owner,list_name,list_description,status_name
```

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Friday April 27, 2012 15:16:07 PM

[Users](#)
[Campaigns](#)
[Lists](#)
[Scripts](#)
[Filters](#)
[Inbound](#)
[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

Export Leads Report

This report pulls lead information for calls dialed in the selected date range. A lead is only exported once no matter how many calls were handled. The current lead status is used.

Date Range:
2012-04-27
to
2012-04-27

Header Row:
YES

Recording Fields:
NONE

Custom Fields:
YES

Per Call Notes:
NO

Export Fields:
EXTENDED

Campaigns:
---NONE---
1000

Inbound Groups:
---NONE---
AGENTDIRECT

Lists:
---ALL---
998
999

Statuses:
ADC
AFAX
AFTHRS
AL
AM
B
CALLBK
CBHOLD
DC
DEC
DNC
DNCC
DNCL
DROP
ERI
INCALL
IVRFR
MAXCAL
MLINAT
N

User Groups:
---ALL---
ADMIN
AGENTS

SUBMIT

Figure 65. Export Leads Report

EXPORT LEADS REPORT

This is similar to the “EXPORT CALLS REPORT” in the information. However, rather than showing each individual call, it displays all the leads the calls were placed to. Each entry will only appear once, no matter how many times it was dialed during the reporting period. This report can be exported to a spreadsheet capable .TXT document, by selecting the DOWNLOAD link.

VICIdial

ADMINISTRATION

Users

Campaigns

Lists

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

Reports

VERSION: 2.4-364a

BUILD: 120409-1136

© 2012 ViciDial Group

HOME

Timeclock

Logout (6666)

Friday April 27, 2012 15:18:42 PM

ADMIN CHANGE LOG: Section Records - LISTS - 999

ID	DATE TIME	USER	IP	SECTION	TYPE	RECORD ID	GROUP	DESCRIPTION	GOTO
45	2012-04-26 10:50:35	6666	192.168.198.2	LISTS	MODIFY	999	---ALL---	ADMIN MODIFY LIST	GOTO
44	2012-04-26 10:49:45	6666	192.168.198.2	LISTS	MODIFY	999	---ALL---	ADMIN MODIFY LIST	GOTO
40	2012-04-24 17:29:38	6666	192.168.198.112	LISTS	LOAD	999	---ALL---	ADMIN LOAD LIST CUSTOM	GOTO
39	2012-04-24 17:28:30	6666	192.168.198.112	LISTS	LOAD	999	---ALL---	ADMIN LOAD LIST	GOTO
5	2012-04-24 14:45:07	6666	192.168.198.2	LISTS	LOAD	999	---ALL---	ADMIN LOAD LIST	GOTO

Figure 66. Admin Changes Log Listing example for List ID 107

ADMIN CHANGES LOG

This set of reports allows you to look at all of the changes made by users of the Administration interface, which you can view by administrative section and record altered. You can also view the database query that was used to make the change.

Server-Specific Reports

The second set of reports are specific to only one VICIdial server on your network. For most of these reports there is a table with the report title at the top and the server name across the left side where you can click on the report that you want. Also, in this table you can find the server load average, CPU load %, number of active Asterisk channels and the highest hard drive use percentage for each server.

VICIDIAL: Server Performance 2009-04-02 00:42:02
Time range: 2009-04-01 09:00:00 to 2009-04-02 00:05:00

```
----- TOTALS, PEAKS and AVERAGES
Total Calls in/out on this server:      106113
Total Off-Hook time on this server (min): 39928.11
Average/Peak channels in use for server: 187.4519 / 278
Average/Peak load for server:          63.5744 / 197
Average USER process cpu percentage:   5.8136 %
Average SYSTEM process cpu percentage:  2.2263 %
Average IDLE process cpu percentage:    91.9567 %
```

```
----- LINE GRAPH:
rows: 11143    tick: 120 minutes    scale: 30 minutes
```

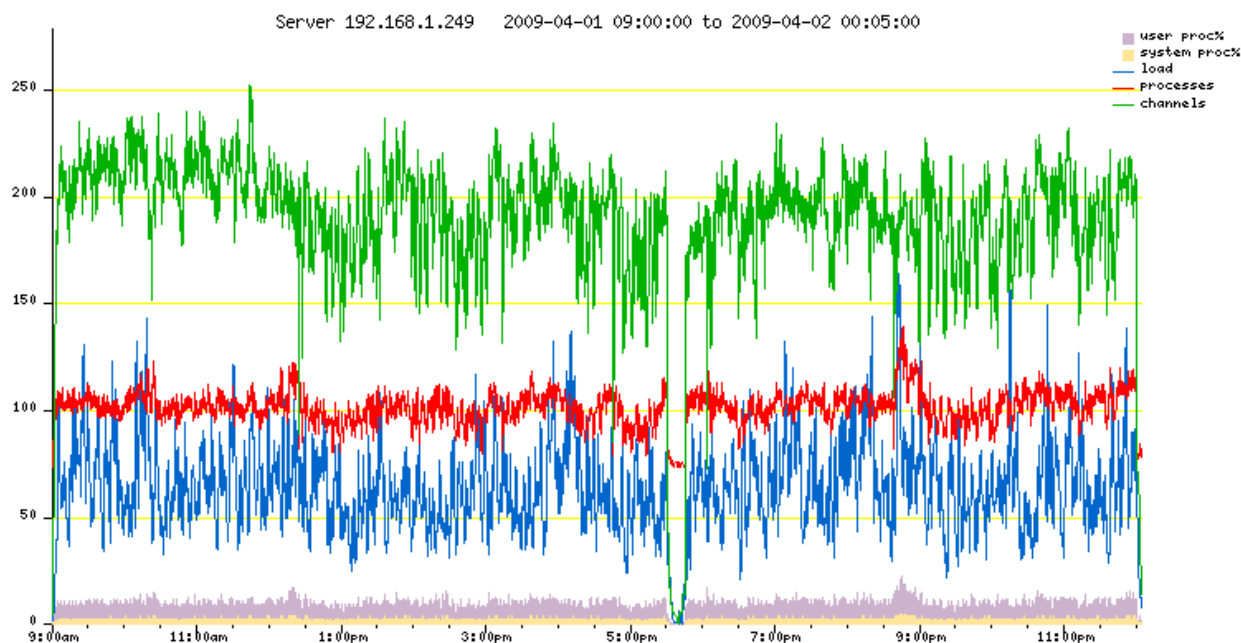


Figure 67. Server Performance Report

SERVER PERFORMANCE REPORT

You will need to check with your systems administrator to see if the Server Performance Report is installed on your system. This report does not tell you anything about campaigns or agent performance, but instead focuses on the system performance of the physical server that is running VICIdial. The information is gathered on the server once every 5 seconds and the report period can be defined from one day to another using the following date-time format: YYYY-MM-DD HH:MM:SS. The summary information at the top will show you the number of calls that this server handled during the shift, the total off-hook minutes for the shift, the average number of Asterisk channels that were in use at any given time, the average system load, the peak system load and the breakdown of the average USER, SYSTEM and IDLE processor time percentages. The graph portion gives you a graphical representation of the number of processes, system load, number of Asterisk channels and the USER/SYSTEM system processor time percentage. This report can give you a better idea of when you may need more capacity or what the load on the system might be when you may have experienced a group of problems with your system. **SYS ADMIN NOTE:** to activate system logging: make sure that the Administration section server record has the System Performance setting set to Y. This is one of

the few reports that can not be downloaded.

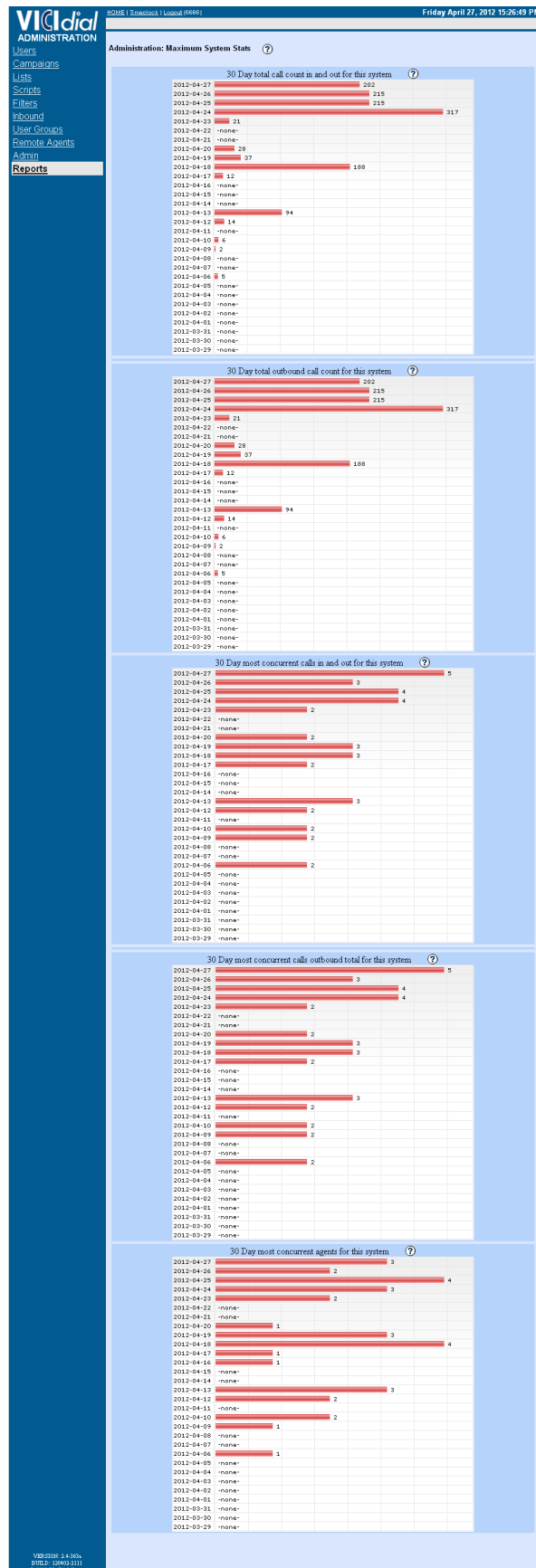


Figure 68. Maximum System Stats

MAXIMUM SYSTEM STATS

This report displays a data and a bar graph for each of the last 30 days. It tracks TOTAL CALL COUNT IN AND OUT FOR THIS SYSTEM, TOTAL INBOUND CALL COUNT FOR THIS SYSTEM, TOTAL OUTBOUND CALL COUNT FOR THIS SYSTEM, MOST CONCURRENT CALLS IN AND OUT FOR THIS SYSTEM, MOST CONCURRENT CALLS INBOUND TOTAL FOR THIS SYSTEM, MOST CONCURRENT CALLS OUTBOUND TOTAL FOR THIS SYSTEM, MOST CONCURRENT AGENTS FOR THIS SYSTEM. This is one of the few reports that can not be exported.

SERVER: 192.168.201.59

Agents Time On Calls 2012-04-27 15:53:55 [CLOSER](#) | [REPORTS](#)

STATION	PHONE	USER	SESSIONID	CHANNEL	STATUS	CALLTIME	MINUTES
SIP/201	201	201	8600050	SIP/sgw1-000009de	INCALL	15:53:13	0:42
SIP/202	202	202	8600051	SIP/sgw1-00000923	INCALL	15:51:08	22:47
SIP/203	203	203	8600053	SIP/sgw1-0000093e	INCALL	15:56:14	17:41
SIP/204	204	204	8600056		READY	- WAIT -	0:26
SIP/205	205	205	8600055	SIP/sgw1-000009a0	INCALL	15:49:05	4:50
SIP/206	206	206	8600054	SIP/sgw1-00000922	INCALL	15:51:03	22:52
SIP/207	207	207	8600052	SIP/sgw1-00000817	INCALL	15:08:00	46:56
SIP/208	208	208	8600057		READY	- WAIT -	0:15
SIP/209	209	209	8600055	SIP/sgw1-0000095f	INCALL	15:40:03	13:52
SIP/210	210	210	8600058		READY	- WAIT -	0:20
SIP/211	211	211	8600054		READY	- WAIT -	0:18
SIP/213	213	213	8600055	SIP/sgw1-000009df	INCALL	15:53:43	0:12
SIP/216	216	216	8600052	SIP/sgw1-000009da	INCALL	15:53:31	0:24
SIP/217	217	217	8600059	SIP/sgw1-00000960	INCALL	15:40:08	13:47
SIP/218	218	218	8600057	SIP/sgw1-000008b6	INCALL	15:20:20	33:35
SIP/219	219	219	8600058	SIP/sgw1-000008bb	INCALL	15:20:49	33:06
SIP/220	220	220	8600053		READY	- WAIT -	0:12

17 agents logged in on server 192.168.201.59

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

Server-Specific Real-Time Report TRUNK SHORT: 0 2012-04-27 15:53:55

CHANNEL	STATUS	CAMPAIGN	PHONE NUMBER	CALLTIME	MINUTES
	SENT	201	1312	15:53:46	0:09
	SENT	201	1308	15:53:46	0:09
	SENT	201	1864	15:53:46	0:09
	SENT	201	1252	15:53:46	0:09
	SENT	201	1440	15:53:42	0:13
	SENT	201	1602	15:53:42	0:13
	SENT	201	1304	15:53:42	0:13
	SENT	201	1770	15:53:42	0:13
	SENT	201	1480	15:53:39	0:16
	SENT	201	1931	15:53:39	0:16
	SENT	201	1310	15:53:39	0:16
	SENT	201	1631	15:53:39	0:16
	SENT	201	1715	15:53:39	0:16

13 calls being placed on server 192.168.201.59

-  - LIVE CALL WAITING

Figure 69. Server-Specific Time on VDAD Report

TIME ON VDAD Report

This report will show all VICIdial activity on the server, the agents logged in, their status, if they are on a call and the time on call as well as the numbers that are being dialed out (and their campaigns) and if there are any calls waiting for an agent.

CLOSER INBOUND Time REPORT

This report is similar to the TIME ON VDAD report except it is for CLOSER or Inbound campaigns and will show the inbound group that the call came from.

PHONE-BASED VICIdial FUNCTIONS

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

Generating audio prompts through a phone

You have the ability to record audio prompts for Asterisk and VICIdial to use just by using the phone. To record a new prompt just dial 8168 on your phone connected to your VICIdial server. You will be prompted for an ID (which is 4321 followed by the pound key #). Once you are logged in, you will hear the recording instructions and after the beep you can start recording your message. When you are done recording you should press the pound(hash) key. You will then be presented with three options: press 1 to save the prompt, press 2 to listen to the prompt you just recorded or press 3 to re-record the prompt. Once you accept the recording, the filename of the recording will be played back to you. The system will start with 85100001 as the first ID and will increment by one every time you go to record a new file. Within VICIdial these recordings can be used in several fields including:

- The Answering Machine Message field in the Campaigns screen
- The Safe Harbor Exten field in the Campaigns screen
- The Drop Exten field in the In-Groups screen
- The after-hours message for In-Groups
- The agent alert message for In-Groups
- Several places in the Campaign Survey options

Blind Monitoring VICIdial Agents

One other function that can be used through a VICIdial-attached phone is to listen in on a VICIdial Agent and the customer they are talking to without them hearing that you are on the line monitoring them. To do this, simply dial 0 plus the session ID(for example: 0 + 8600051 so you would dial 08600051) of the Agent you wish to monitor. You can find the listing of Agents and their associated sessionIDs on the Real-time report (also known as "Time On VDAD") page. To finish, simply hangup the phone.

Another method of blind monitoring allows you to go from session to session on a single VICIdial server without hanging up in between. If you dial 8162 you will hear "extension" and you will be able to dial 8 + the last 3 digits of the agent's session ID to blind monitor the agent(i.e. 8051 for session 8600051). Then when you want to move to another session you press any digit on your phone and you will be brought back to the "extension" prompt. You can also barge in using this dial-in, but you would dial 99 + the last 3 digits of the agent's sessionID (i.e. 99051 for 8600051).

Your systems Administrator may have also set up shortcut numbers to dial if you have a multi-server system to be able to monitor agents on all servers across your VICIdial setup, check with your Administrator to see if they have done this on your system.

See also the web-based method of monitoring through the Real-Time Report mentioned above.

Manager Barge-in on VICIdial Agent Calls

It is even easier for a Manager to enter a conversation with an Agent and their Customer by simply dialing the Agent's session ID(for example 8600051) into their VICIdial-attached phone. Once the number is dialed, both parties will hear the entry tone(double tone) and the Manager can talk to and listen to both of the other parties on the call. To finish, simply hang up the phone.

Admin Utilites

The “Admin Utilities” link appears at the bottom of the main reports page if you are a level 9 user. This page contains Administrative utilities that may be useful for administrating and debugging your system.

Welcome Languages Page

This page has links to all of the non-English agent and administrative interfaces on your system if they were installed.

Campaign Debug Page

This page will allow you to select a campaign and see the back-end logging that is taking place and can help to debug issues on an auto-dial campaign.

Carrier Log Report

This is a report that allows you to see all dial attempts and response codes of calls going out from your system, as well as offering you the ability to download those logs.

Hangup Cause Report

This is a report that allows you to see the carrier hangup causes for all calls going out from your systems. You can also define only specific hangup causes to have displayed on the screen.

Bulk Phone Insert Page

This page allows you to create new phone entries on your system, even across multiple servers with phone aliases for use with phone login load balancing. This page has no UNDO button, so please make sure you know what you are doing before you utilize it. This is why we only recommend advanced administrators use this utility.

Send a Call With Custom CID Page

This utility allows you to send out a phone call from a server on your system with a defined callerID number. This will only work if your carrier allows it.

Speech Voice Lab Page

This utility was created to allow for students in a call center school to all log into the system as agents, and then have a native language speaker log into this page to have their voice broadcast to all agents logged into a specific campaign so that they can hear the native speaker and then repeat as they are being recorded or monitored by teachers.

Webphone Only Page

This page allows anyone with access to the agent interface to log in and use the Zoiper Webphone if it is installed on your system.

QUEUEMETRICS INTEGRATION

QueueMetrics is a proprietary pay-for statistical analysis program suite created by Loway Research to work with Asterisk-based call centers. VICIdial fully integrates with the QueueMetrics statistical analysis package through its 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/>.

ZOIPER WEBPHONE INTEGRATION

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

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

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

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

CEPSTRAL INTEGRATION

Cepstral provides text to speech integration to VICIdial. Depending on how your System Administrator has set up the integration on your server, VICIdial can integrate with Cepstral in the following ways:

- Any of VICIdial's Campaign-related audio prompts can utilize TTS scripts
 - Cepstral uses SSML to allow you to control aspects of speech such as pronunciation, volume, pitch, rate, etc.
 - The speech scripting can utilize any of the default lead tables.
- (for configuration information see tutorial - S. Brief overview of Cepstral Text To Speech software integration.)

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

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

ORECX OREKA INTEGRATION

Orecx offers the Oreka open-source software suite providing advanced recording capabilities with Voice-over-IP systems like Vicidial. Oreka will require additional configuration to work properly. It requires you to set up your VICIdial servers in pairs (also known as “server twining”) to operate. Depending on how your System Administrator has set up the integration on your server, VICIdial can integrate with Oreka in the following ways:

- It allows for the capture of the SIP audio and can handle audio compression
- Oreka can also capture the agent's screen, so every action on the call can be logged.

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

SANGOMA CALL PROGRESS DETECTION(CPD) INTEGRATION

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

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

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

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

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

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

VTIGER INTEGRATION

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

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

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

<http://www.vtiger.com/>

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

Security Alert: Because of several large security exploits that exist in Vtiger, we no longer recommend VICIdial integration in any situation..

Non-agent API document

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

Changes:

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

API Functions use the 'function' variable

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

API functions:

version

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

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?function=version

Example responses:

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

sounds_list

Outputs a list of audio files from the audio store

NOTE: api user for this function must have user_level set to 7 or higher

Optional Fields

format - format of the output - (tab, link, selectframe)

stage - how to sort the output (date, size, name)

comments - name of the field to populate

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=sounds_list&format=selectframe&comments=fieldname&stage=date

Example responses:

<success is inferred by output of audio files list>

ERROR: sounds_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST

ERROR: sounds_list CENTRAL SOUND CONTROL IS NOT ACTIVE

moh_list

Outputs a list of music on hold classes in the system

NOTE: api user for this function must have user_level set to 7 or higher

Optional Fields

format - format of the output - (tab, link, selectframe)

comments - name of the field to populate

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=moh_list&format=selectframe&comments=fieldname&stage=date

Example responses:

<success is inferred by output of moh classes list>

ERROR: moh_list USER DOES NOT HAVE PERMISSION TO VIEW SOUNDS LIST

ERROR: moh_list CENTRAL SOUND CONTROL IS NOT ACTIVE

vm_list

Outputs a list of voicemail boxes in the system

NOTE: api user for this function must have user_level set to 7 or higher

Optional Fields

format - format of the output - (tab, link, selectframe)

comments - name of the field to populate

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=vm_list&format=selectframe&comments=fieldname&stage=date

Example responses:

<success is inferred by output of voicemail boxes list>

ERROR: vm_list USER DOES NOT HAVE PERMISSION TO VIEW VOICEMAIL BOXES LIST

ERROR: vm_list CENTRAL SOUND CONTROL IS NOT ACTIVE

blind_monitor

Calls user-defined phone and places them in session as blind monitor

NOTE: api user for this function must have user_level set to 7 or higher

Required Fields

phone_login - alpha-numeric, no spaces or special characters allowed

session_id - must be all numbers, 7 digits

server_ip - must be all numbers and dots, max 15 characters

source - description of what originated the API call (maximum 20 characters)

stage - MONITOR, BARGE or HIJACK, default is MONITOR (HIJACK option is not currently functional)

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=blind_monitor&phone_login=350a&session_id=8600051&server_ip=10.10.10.16&stage=MONITOR

Example responses:

SUCCESS: blind_monitor HAS BEEN LAUNCHED - 350a|010*010*010*017*350|8600051

ERROR: blind_monitor INVALID PHONE LOGIN - 350q

ERROR: blind_monitor INVALID SESSION ID - 8602051

ERROR: blind_monitor USER DOES NOT HAVE PERMISSION TO BLIND MONITOR - 6666|0
ERROR: NO FUNCTION SPECIFIED

agent_ingroup_info

agent_ingroup_info - shows in-group and outbound auto-dial info for logged-in agent

NOTE: api user for this function must have user_level set to 7 or higher

Required Fields

agent_user - 2-20 characters

source - description of what originated the API call (maximum 20 characters)

Settings Fields

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

Example URL strings for API calls:

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

source=test&function=agent_ingroup_info&stage=change&user=6666&pass=1234&agent_user=1000

Example responses:

ERROR: agent_ingroup_info USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: agent_ingroup_info INVALID USER ID - 1255|6666

recording_lookup

looks up recordings based upon user and date or lead_id

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

Required Fields

agent_user - 2-20 characters

lead_id - 1-10 digits

date - date of the calls to pull (must be in YYYY-MM-DD format)

uniqueid - uniqueid of the call, works best included with another search field

Settings Fields

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

Notes

There is a hard limit of 100000 results

Example URL strings for API calls:

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

source=test&function=recording_lookup&stage=pipe&user=6666&pass=1234&agent_user=1000&date=2010-12-03

Example responses:

ERROR: recording_lookup USER DOES NOT HAVE PERMISSION TO GET RECORDING INFO - 6666|0

ERROR: recording_lookup INVALID SEARCH PARAMETERS - 6666|1000|2010-12-03|

ERROR: recording_lookup NO RECORDINGS FOUND - 1255|6666|2010-12-03|

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

start_time|user|recording_id|lead_id|location

2010-12-03 12:00:01|1000|534820|876409|

http://server/path/to/recording/20101203_120000_1234567890_1000-all.wav

did_log_export

exports all calls inbound to a DID for one day

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

Required Fields:

phone_number - 2-20 characters, the DID that you want to pull logs for

date - date of the calls to pull (must be in YYYY-MM-DD format)

Settings Fields:

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

NOTES:

There is a hard limit of 100000 results

Example URL strings for API calls:

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

source=test&function=did_log_export&stage=pipe&user=6666&pass=1234&phone_number=3125551212&date=2010-12-03

Example responses:

ERROR: did_log_export USER DOES NOT HAVE PERMISSION TO GET DID INFO - 6666|0

ERROR: did_log_export INVALID SEARCH PARAMETERS - 6666|3125551212|2010-12-03

ERROR: did_log_export NO RECORDS FOUND - 1255|3125551212|2010-12-03

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

did_number|call_date|caller_id_number|length_in_sec3125551212|2010-12-03 12:00:01|7275551212|123

agent_stats_export

exports agent activity statistics

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

Required Fields:

source - description of what originated the API call (maximum 20 characters)

datetime_start - start date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format)

datetime_end - end date/time of the agent activity to pull (must be in "YYYY-MM-DD+HH:MM:SS" format)

Settings Field:

agent_user - 2-20 characters, use only for one agent stats

stage - the format of the exported data: csv, tab, pipe(default)

header - include a header(YES) or not(NO). This is optional, default is not to include a header

time_format - time format('H','HF','M','S') in hours, minutes or seconds: H = 1:23:45, M = 83:45, S = 5023 (default 'HF')

* HF will force hour format even for zero seconds time "0:00:00"

Notes:

There is a hard limit of 10000000 records analyzed

Example URL strings for API calls:

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

source=test&function=agent_stats_export&time_format=M&stage=pipe&user=6666&pass=1234&agent_user=3125551212&datetime_start=2012-03-26+00:00:00&datetime_end=2012-03-26+23:59:59

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

DB=0&stage=pipe&user=6666&pass=1234&source=test&function=agent_stats_export&datetime_start=2012-03-26+00:00:00&datetime_end=2012-03-26+23:59:59&header=YES

Example responses:

ERROR: agent_stats_export USER DOES NOT HAVE PERMISSION TO GET AGENT INFO - 6666|0

ERROR: agent_stats_export INVALID SEARCH PARAMETERS - 6666||2010-12-03 00:00:00|2010-12-03 00:00:01

ERROR: agent_stats_export NO RECORDS FOUND - 1255||2010-12-03 00:00:00|2010-12-03 00:00:01

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

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

add_lead

Adds a new lead to the vicidial_list table with several fields and options

NOTE: api user for this function must have modify_leads set to 1 and user_level must be set to 8 or

higher

NOTE: For fields with spaces in the values, you can replace the space with a plus + sign[address, city, first_name, etc.

Required Fields

phone_number - must be all numbers, 6-16 digits

phone_code - must be all numbers, 1-4 digits, defaults to 1 if not set

list_id - must be all numbers, 3-12 digits, defaults to 999 if not set

source - description of what originated the API call (maximum 20 characters)

Settings Fields

dnc_check - Y, N or AREACODE, default is N

campaign_dnc_check - Y, N or AREACODE, default is N

campaign_id - 2-8 Character campaign ID, required if using campaign_dnc_check

add_to_hopper - Y or N, default is N

hopper_priority - 99 to -99, the higher number the higher priority, default is 0

hopper_local_call_time_check - Y or N, default is N. Validate the local call time before inserting lead in the hopper

usacan_prefix_check - Y or N, default is N. Check for a valid 4th digit for USA and Canada phone numbers (cannot be 0 or 1)

usacan_areacode_check - Y or N, default is N. Check for a valid area code for USA and Canada phone numbers

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

POSTAL relies on the postal_code field

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

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

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

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

callback_type - USERONLY or ANYONE, default is ANYONE

callback_user - User ID the USERONLY callback is assigned to

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

Custom Fields Settings

custom_fields - Y or N, default is N. Defines whether the API will accept custom field data when inserting leads into the vicidial_list table.

For custom fields to be inserted, just add the field label as a variable to the URL string

For example, if the field_label is "favorite_color" you would add "&favorite_color=blue"

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

DNC Settings

duplicate_check - Check for duplicate records in the system, can select more than one

(duplicate_check=DUPLISTDUPTITLEALTPHONELIST) If duplicate is found, will return error, the

duplicate data and lead_id and list_id of existing record

Duplicate_Check Options

DUPLIST - check for duplicate phone_number in same list

DUPCAMP - check for duplicate phone_number in all lists for this list's campaign

DUPSYS - check for duplicate phone_number in entire system

DUPTITLEALTPHONELIST - check for duplicate title and alt_phone in same list

DUPTITLEALTPHONECAMP - check for duplicate title and alt_phone in all lists for this list's campaign

DUPTITLEALTPHONESYS - check for duplicate title and alt_phone in entire system

Optional Fields

vendor_lead_code - 1-20 characters

source_id - 1-50 characters

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

title - 1-4 characters

first_name - 1-30 characters

middle_initial - 1 character

last_name - 1-30 characters

address1 - 1-100 characters

address2 - 1-100 characters

address3 - 1-100 characters

city - 1-50 characters

state - 2 characters

province - 1-50 characters

postal_code - 1-10 characters

country_code - 3 characters

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

date_of_birth - YYYY-MM-DD

alt_phone - 1-12 characters

email - 1-70 characters

security_phrase - 1-100 characters

comments - 1-255 characters

multi_alt_phones - 5-1024 characters (see examples for more info)

rank - 1-5 digits

owner - 1-20 characters (user ID, Territory or user group)

Multi-ALT-Phones format:

7275551212_1_work!7275551213_1_sister+house!1234567890_1_neighbor

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

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=add_lead&phone_number=7275551111

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

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

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

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

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

Example responses:

SUCCESS: add_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193715|-4

NOTICE: add_lead ADDED TO HOPPER - 7275551111|6666|193715|1677922

SUCCESS: add_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4

NOTICE: add_lead CUSTOM FIELDS VALUES ADDED - 7275551111|1234|101

NOTICE: add_lead CUSTOM FIELDS NOT ADDED, CUSTOM FIELDS DISABLED - 7275551111|
Y|0

NOTICE: add_lead CUSTOM FIELDS NOT ADDED, NO CUSTOM FIELDS DEFINED FOR THIS
LIST - 7275551111|

1234|101

NOTICE: add_lead CUSTOM FIELDS NOT ADDED, NO FIELDS DEFINED - 7275551111|1234|
101

NOTICE: add_lead MULTI-ALT-PHONE NUMBERS LOADED - 3|6666|193716

NOTICE: add_lead NOT ADDED TO HOPPER, OUTSIDE OF LOCAL TIME - 7275551111|6666|
193716|-4|0

ERROR: add_lead INVALID PHONE NUMBER - 72755|6666

ERROR: add_lead USER DOES NOT HAVE PERMISSION TO ADD LEADS TO THE SYSTEM -
6666|0

ERROR: NO FUNCTION SPECIFIED

ERROR: add_lead DUPLICATE PHONE NUMBER IN LIST - 7275551111|101|8765444

ERROR: add_lead DUPLICATE PHONE NUMBER IN CAMPAIGN LISTS - 7275551111|101|
8765444|101

ERROR: add_lead DUPLICATE PHONE NUMBER IN SYSTEM - 7275551111|101|8765444|101

ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN LIST - 1234|7275551111|101|8765444

ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN CAMPAIGN LISTS - 1234|7275551111|
101|8765444|101

ERROR: add_lead DUPLICATE TITLE ALT_PHONE IN SYSTEM – 1234|7275551111|101|8765444|101

update_lead

updates lead information in the vicidial_list and custom_tables

NOTE: api user for this function must have modify_leads set to 1 and user_level must be set to 8 or higher

Required Fields

lead_id - must be all numbers, 1-9 digits, not required if using vendor_lead_code or phone_number

vendor_lead_code - can be used instead of lead_id to match leads

phone_number - can be used instead of lead_id or vendor_lead_code to match leads

source - description of what originated the API call (maximum 20 characters)

Settings Fields

search_method - You can combine the following 3 options in this field to search the parameters you desire:

LEAD_ID - will attempt to find a match with the lead_id

VENDOR_LEAD_CODE - will attempt to find a match with the vendor_lead_code

PHONE_NUMBER - will attempt to find a match with the phone_number. For example to search lead_id and vendor_lead_code:

"&search_method=LEAD_ID_VENDOR_LEAD_CODE"

The search order is NOT preserved, Lead ID is always first, Vendor Lead Code is second and Phone number is last. Default is "LEAD_ID"

search_location - Where to check for records in the system, can select only one (default is SYSTEM):

LIST - check for lead in same list

CAMPAIGN - check for lead in all lists for this list's campaign

SYSTEM - check for lead in entire system. If no list_id is defined, the the search_location will be assumed as SYSTEM

insert_if_not_found - Y or N, will attempt to insert as a NEW lead if no match is found, default is N. Insertion will require phone_code, phone_number and list_id. lead_id will be ignored. Most of the add_lead options that are not available if you use this setting in this function.

records - number of records to update if more than 1 found (defaults to '1'[most recently loaded lead])

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

"&favorite_color=blue"

no_update - Y or N, Setting this to Y will not perform any updates, but will instead only tell you if a lead exists that matches the search criteria, default is N.

delete_lead - Y or N, Setting this to Y will delete the lead from the vicidial_list table, default is N.

reset_lead - Y or N, Setting this to Y will reset the called-since-last-reset flag of the lead, default is N.

callback - Y, N or REMOVE, default is N. Set this lead as a scheduled callback. REMOVE will delete the scheduled callback entry

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

callback_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED

if callback is set. NOW can be used for current datetime.

callback_type - USERONLY or ANYONE, default is ANYONE

callback_user - User ID the USERONLY callback is assigned to

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

Editable Fields

user_field - 1-20 characters, this updates the 'user' field in the vicidial_list table

list_id_field - 3-12 digits, this updates the 'list_id' field in the vicidial_list table

status - 1-6 characters, not punctuation or spaces

vendor_lead_code - 1-20 characters

source_id - 1-50 characters

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

title - 1-4 characters

first_name - 1-30 characters

middle_initial - 1 character

last_name - 1-30 characters

address1 - 1-100 characters

address2 - 1-100 characters

address3 - 1-100 characters

city - 1-50 characters

state - 2 characters

province - 1-50 characters

postal_code - 1-10 characters

country_code - 3 characters

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

date_of_birth - YYYY-MM-DD

alt_phone - 1-12 characters

email - 1-70 characters

security_phrase - 1-100 characters

comments - 1-255 characters

rank - 1-5 digits

owner - 1-20 characters (user ID, Territory or user group)

called_count - digits only, the number of attempts dialing the lead

NOTES

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

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

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=update_lead&lead_id=27&last_name=SMITH

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

source=test&user=6666&pass=1234&function=update_lead&search_method=VENDOR_LEAD_CODE&vendor_lead_code=1000019&last_name=JOHNSON

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

source=test&user=6666&pass=1234&function=update_lead&search_method=PHONE_NUMBER&re

cords=2&list_id=8107&search_location=LIST&phone_number=9999000019&last_name=WILSON
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&lead_id=405794&last_name=SMITH&city=Chicago&custom_fields=Y&favorite_color=blue
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&search_location=LIST&search_method=PHONE_NUMBER&insert_if_not_found=Y&phone_number=9999000029&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&city=Chicago&custom_fields=Y&favorite_color=red
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&insert_if_not_found=Y&search_method=VENDOR_LEAD_CODE_PHONE_NUMBER&vendor_lead_code=89763545&phone_number=7275551212&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&custom_fields=Y&favorite_color=blue
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&search_location=LIST&search_method=VENDOR_LEAD_CODE_PHONE_NUMBER&insert_if_not_found=Y&phone_number=9999000029&phone_code=1&list_id=999&first_name=Bob&last_name=Wilson&city=Chicago&custom_fields=Y&favorite_color=red&user_field=1008&list_id_field=107&status=OLD
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&lead_id=27&no_update=Y
 http://server/vicidial/non_agent_api.php?
 source=test&user=6666&pass=1234&function=update_lead&lead_id=27&delete_lead=Y

Example Responses

SUCCESS: update_lead LEAD HAS BEEN UPDATED - 6666|193716
 NOTICE: update_lead CUSTOM FIELDS VALUES UPDATED - 7275551111|1234|101
 NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, CUSTOM FIELDS DISABLED - 7275551111|Y|0
 NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, NO CUSTOM FIELDS DEFINED FOR THIS LIST - 7275551111|1234|101
 NOTICE: update_lead CUSTOM FIELDS NOT UPDATED, NO FIELDS DEFINED - 7275551111|1234|101
 NOTICE: update_lead NO MATCHES FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212
 SUCCESS: update_lead LEAD HAS BEEN ADDED - 7275551111|6666|999|193716|-4
 SUCCESS: update_lead LEAD HAS BEEN DELETED - 7275551111|6666|999|193716|-4
 NOTICE: update_lead LEADS FOUND IN THE SYSTEM - 6666|4567|897654327|7275551212|101|101
 ERROR: update_lead INVALID DATA FOR LEAD INSERTION - 6666|||
 ERROR: update_lead NO MATCHES FOUND IN THE SYSTEM - 6666|||
 ERROR: update_lead NO VALID SEARCH METHOD - 6666|SYSTEM|||
 ERROR: update_lead USER DOES NOT HAVE PERMISSION TO UPDATE LEADS IN THE SYSTEM - 6666|0
 ERROR: NO FUNCTION SPECIFIED

add_user

Adds a user to the system

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

Required Fields:

agent_user - 2-20 characters (for auto-generated send 'AUTOGENERATED')

agent_pass - 1-20 characters

agent_user_level - 1 through 9, one digit only

agent_full_name - 1-50 characters

agent_user_group - 1-20 characters, must be a valid user group

Optional Fields:

phone_login - 1-20 characters

phone_pass - 1-20 characters

hotkeys_active - 0 or 1

voicemail_id - 1-10 digits

email - 1-100 characters

custom_one - 1-100 characters

custom_two - 1-100 characters

custom_three - 1-100 characters

custom_four - 1-100 characters

custom_five - 1-100 characters

NOTE: This function does not work with Vtiger integration

Example URL strings for API calls:

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

source=test&function=add_user&user=6666&pass=1234&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS

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

source=test&function=add_user&user=6666&pass=1234&agent_user=1000&agent_pass=9999&agent_user_level=1&agent_full_name=Testing+Person&agent_user_group=AGENTS&phone_login=100&phone_pass=test&hotkeys_active=1&voicemail_id=&custom_one=jjjj&custom_two=yyyy&custom_three=kkk&custom_four=www&custom_five=hhhh

Example Responses:

ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS - 6666|0

ERROR: add_user YOU MUST USE ALL REQUIRED FIELDS - 6666|1000|||

ERROR: add_user USER DOES NOT HAVE PERMISSION TO ADD USERS IN THIS USER LEVEL - 6666|8

ERROR: add_user USER GROUP DOES NOT EXIST - 6666|ADFHR

ERROR: add_user USER ALREADY EXISTS - 6666|6666

SUCCESS: add_user USER HAS BEEN ADDED - 6666|1000|1234|8|Testing+Person|AGENTS

add_phone

Adds a phone to the system

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

Required Fields:

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

Optional Fields:

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

Example URL strings for API calls:

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

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

Example Responses:

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

update_phone

Updates or deletes a phone entry already in the system

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

Required Fields:

extension - 2-100 characters
server_ip - 7-15 characters, must be a valid server_ip

Setting Fields:

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

Editable Fields:

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

Example URL strings for API calls:

http://server/vicidial/non_agent_api.php?
source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=5
5000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protoc
ol=SIP®istration_password=test&phone_full_name=Extension+55000&local_gmt=-
5.00&outbound_cid=7275551212

http://server/vicidial/non_agent_api.php?
source=test&function=update_phone&user=6666&pass=1234&extension=55000&dialplan_number=5
5000&voicemail_id=55000&phone_login=55000&phone_pass=test&server_ip=192.168.198.5&protoc
ol=SIP®istration_password=test&phone_full_name=Extension+55000&local_gmt=-
5.00&outbound_cid=7275551212&phone_context=default&email=test@test.com

http://server/vicidial/non_agent_api.php?
source=test&function=update_phone&user=6666&pass=1234&extension=55000&server_ip=192.168.
198.5&delete_phone=Y

Example Responses:

ERROR: update_phone USER DOES NOT HAVE PERMISSION TO UPDATE PHONES - 6666|0
ERROR: update_phone YOU MUST USE ALL REQUIRED FIELDS - 6666||
ERROR: update_phone SERVER DOES NOT EXIST - 6666|10.0.9.9
ERROR: update_phone PHONE DOES NOT EXIST ON THIS SERVER - 6666|10.0.9.8|cc101
ERROR: update_phone LOGIN ALREADY EXISTS - 6666|x101
ERROR: update_phone YOU MUST USE A VALID TIMEZONE - 6666|-99
ERROR: update_phone YOU MUST USE A VALID DIALPLAN NUMBER - 6666|0
ERROR: update_phone YOU MUST USE A VALID VOICEMAIL NUMBER - 6666|0
ERROR: update_phone YOU MUST USE A VALID PHONE PASSWORD - 6666|0
ERROR: update_phone YOU MUST USE A VALID REGISTRATION PASSWORD - 6666|0
ERROR: update_phone YOU MUST USE A VALID PROTOCOL - 6666|0

ERROR: update_phone YOU MUST USE A VALID PHONE NAME - 6666|0
ERROR: update_phone YOU MUST USE A VALID PHONE CONTEXT - 6666|0
ERROR: update_phone NO UPDATES DEFINED - 6666|0
SUCCESS: update_phone PHONE HAS BEEN UPDATED - 6666|cc100|10.0.9.8|SIP|100
SUCCESS: update_phone PHONE HAS BEEN DELETED - 6666|cc100|10.0.9.8|

add_phone_alias

Adds a phone alias entry to the system

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

Required Fields:

alias_id - 2-20 characters

phone_logins - 2-255 characters (phone logins separated by commas)

alias_name - 1-50 characters

Example URL strings for API calls:

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

source=test&function=add_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ
+testing&phone_logins=100a,100b

Example Responses:

ERROR: add_phone_alias USER DOES NOT HAVE PERMISSION TO ADD PHONE ALIASES -
6666|0

ERROR: add_phone_alias YOU MUST USE ALL REQUIRED FIELDS - 6666||||

ERROR: add_phone_alias PHONE ALIAS ALREADY EXISTS - 6666|x101

ERROR: add_phone_alias PHONE DOES NOT EXIST - 6666|cc100

SUCCESS: add_phone_alias PHONE ALIAS HAS BEEN ADDED - 6666|x100|testing_x100|
cc100,bb100

update_phone_alias

Updates or deletes a phone alias entry already in the system

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

Required Fields:

alias_id - 2-20 characters

phone_logins - 2-255 characters (phone logins separated by commas)

alias_name - 1-50 characters

Settings Fields:

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

Example URL strings for API calls:

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

source=test&function=update_phone_alias&user=6666&pass=1234&alias_id=xyz100&alias_name=XYZ
+testing+X&phone_logins=100a,100b

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

Example Responses:

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

add_list

Adds a list to the system

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

Required Fields:

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

Optional Fields:

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

Example URL strings for API calls:

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

http://server/vicidial/non_agent_api.php?
source=test&function=add_list&user=6666&pass=1234&list_id=1101&list_name=Test+API+list&campaign_id=TESTCAMP&active=N&outbound_cid=7275551212&script=DEMOSCRIPT&am_message=8304&drop_inbound_group=SALESLINE&web_form_address=http://www.vicidial.org/?
testing=hghg

Example Responses:

ERROR: add_list USER DOES NOT HAVE PERMISSION TO ADD LISTS - 6666|0
ERROR: add_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1000||
ERROR: add_list CAMPAIGN DOES NOT EXIST - 6666|TESTCIMP

ERROR: add_list LIST ALREADY EXISTS - 6666|1101
ERROR: add_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|
TESTSCRIPT
ERROR: add_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|
TEST_IN8
ERROR: add_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012
SUCCESS: add_list LIST HAS BEEN ADDED - 6666|1101|TESTCAMP

update_list

Updates list information in the vicidial_lists table

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

Required Fields:

list_id - must be all numbers, 2-14 digits

source - description of what originated the API call (maximum 20 characters)

Settings Fields:

insert_if_not_found - Y or N, will attempt to insert as a new list if no match is found, default is N.

If list is not found, the function will change to add_list and be processed in that way

reset_list - Y or N, Setting this to Y will reset the Called-Since-Last-Reset flag for all of the leads in this list, default is N.

delete_list - Y or N, Setting this to Y will delete the list from the vicidial_lists table, default is N.

delete_leads - Y or N, Setting this to Y will delete all of the leads with this list_id from the vicidial_list table, default is N.

Editable Fields:

list_name - 6-30 characters

campaign_id - 2-8 characters, must be a valid campaign_id

active - Must be one of these: 'Y','N', will default to 'N'

outbound_cid - 6-20 digits

script - 1-10 characters, must be a valid script

am_message - 2-100 characters

drop_inbound_group - 1-10 characters, must be a valid in-group

web_form_address - 6-100 characters

web_form_address_two - 6-100 characters

reset_time - 4-100 characters, must be in valid 4-digit groups of 24-hour time (i.e. 0900-1700-2359)

NOTES:

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

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

Example URL strings for API calls:

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

source=test&user=6666&pass=1234&function=update_list&list_id=1101&list_name=Updated+test+API+list

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

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

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

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

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

Example responses:

ERROR: update_list USER DOES NOT HAVE PERMISSION TO UPDATE LISTS - 6666

ERROR: update_list YOU MUST USE ALL REQUIRED FIELDS - 6666|1

NOTICE: update_list LIST DOES NOT EXIST, SENDING TO add_list FUNCTION - 6666|1000

ERROR: update_list LIST DOES NOT EXIST - 6666|1000

ERROR: update_list CAMPAIGN DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTCIMP

ERROR: update_list SCRIPT DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TESTSCRIPT

ERROR: update_list IN-GROUP DOES NOT EXIST, THIS IS AN OPTIONAL FIELD - 6666|TEST_IN8

ERROR: update_list LIST NAME MUST BE FROM 6 TO 30 CHARACTERS, THIS IS AN OPTIONAL FIELD - 6666|test

ERROR: update_list ACTIVE MUST BE Y OR N, THIS IS AN OPTIONAL FIELD - 6666|U

ERROR: update_list OUTBOUND CID MUST BE FROM 6 TO 18 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|12345

ERROR: update_list ANSWERING MACHINE MESSAGE MUST LESS THAN 101 DIGITS, THIS IS AN OPTIONAL FIELD - 6666|123...

ERROR: update_list RESET TIME IS NOT VALID, THIS IS AN OPTIONAL FIELD - 6666|012

NOTICE: update_list NO UPDATES DEFINED - 6666|

SUCCESS: update_list LIST HAS BEEN UPDATED - 6666|1101

NOTICE: update_list LEADS IN LIST HAVE BEEN RESET - 6666|1101|324

NOTICE: update_list USER DOES NOT HAVE PERMISSION TO DELETE LISTS - 6666|0

NOTICE: update_list LIST HAS BEEN DELETED - 6666|1101|1

NOTICE: update_list USER DOES NOT HAVE PERMISSION TO DELETE LEADS - 6666|0

NOTICE: update_list LEADS IN LIST HAVE BEEN DELETED - 6666|1101|324

ERROR: NO FUNCTION SPECIFIED

Agent API document

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

New scripts:

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

Required variables for all API calls:

user - is the API user

pass - is the API user password

agent_user - is the vicidial agent user whose session that you want to affect

source - description of what originated the API call (maximum 20 characters)

Optional variable for all API calls:

close_window_link - will display a link to close the window, useful if you pop up the API link in a browser window

language - currently only works for close window link: en=English, es=Spanish

To hangup the call, disposition it and then pause the agent, do the following in order:

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

source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=PAUSE

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

source=test&user=6666&pass=1234&agent_user=1000&function=external_hangup&value=1

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

source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=A

Response to calls will return either an ERROR or a SUCCESS along with an explanation. For example:

SUCCESS: external_status function set - 6666|A

ERROR: agent_user is not logged in - 6666

DETAIL OF EACH FUNCTION:

API functions for the VICIDIAL Agent screen

version

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

VALUES: NONE

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

RESPONSES:

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

external_hangup

Hangs up the current customer call on the agent screen

VALUES:

(value) 1 - the only valid value for this function

EXAMPLE URL: `http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=external_hangup&value=1`

RESPONSES:

ERROR: external_hangup not valid - 1|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

SUCCESS: external_hangup function set - 1|6666

external_status

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

VALUES: (value)

value - Any valid status in the VICIDIAL system will work for this function

callback_datetime - YYYY-MM-DD+HH:MM:SS, date and time of scheduled callback. REQUIRED
if callback is set and status is flagged as a scheduled callback

callback_type - USERONLY or ANYONE, default is ANYONE

callback_comments - Optional comments to appear when the callback is called back, must be less than 200 characters in length

qm_dispo_code - Option callstatus code used if QM is enabled

EXAMPLE URL:

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=A`

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=external_status&value=CALLBK&callback_datetime=2012-01-`

`25+12:00:00&callback_type=USERONLY&callback_comments=callback+comments+go+here&qm_dispo_code=1234`

RESPONSES:

ERROR: external_status not valid - A|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

SUCCESS: external_status function set - A|6666

external_pause

Pauses or Resumes the agent. If a Pause and the agent is on a live call will pause after the live call is dispositioned

VALUES: (value)

PAUSE - Pauses the agent session

RESUME - Resumes the agent session

EXAMPLE URLS:

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=PAUSE`

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=external_pause&value=RESUME`

RESPONSES:

ERROR: external_pause not valid - PAUSE|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

SUCCESS: external_pause function set - PAUSE|1232020456|6666

logout

Logs the agent out of the agent interface. If the agent is on a live call, will logout after the live call is dispositioned

VALUES: (value)

LOGOUT - Logout the agent session

EXAMPLE URLS:

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=logout&value=LOGOUT`

RESPONSES:

ERROR: logout not valid - PAUSE|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

SUCCESS: logout function set - LOGOUT|1232020456|6666

external_dial

Places a manual dial phone call on the agent screen, you can define whether to search for the lead in the existing database or not and you can define the phone_code and the number to dial. This action will pause the agent after their current call, enter in the information to place the call, and dialing the call on the agent screen.

VALUES:

value - Any valid phone number (7275551212)

lead_id - Any valid lead_id from the system(either value or lead_id are required) if both are defined, lead_id will override value

phone_code - Any valid phone country code (1 for USA/Canada, 44 for UK, etc...)

search -

YES - perform a search in the campaign-defined vicidial_list list for this phone number & bring up that lead

NO - do not search, create a new vicidial_list record for the call

preview -

YES - preview the lead in the vicidial screen without dialing

NO - do not preview the lead, place call immediately

focus -

YES - change the focus of the screen to the vicidial.php agent interface, brings up an alert in the browser window.

NO - do not change focus

vendor_id - OPTIONAL, any valid Vendor lead code

dial_prefix - OPTIONAL, any dial prefix that you want to add to the beginning of the dial string for this call

group_alias - OPTIONAL, the outbound callerID(from an existing group-alias) that you want to use for this call

vtiger_callback - OPTIONAL, YES or NO, will lookup the phone number and Vtiger account ID from the provided Event ID

alt_user - OPTIONAL, instead of agent_user, this is to lookup the agent_user using the vicidial_users.custom_three field

alt_dial - OPTIONAL, if using lead_id you can set this flag to dial the ALT number or the ADDR3 number

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES)

[source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES)

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES&dial_prefix=88&group_alias=DEFAULT)

[source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES&dial_prefix=88&group_alias=DEFAULT](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_dial&value=7275551212&phone_code=1&search=YES&preview=NO&focus=YES&dial_prefix=88&group_alias=DEFAULT)

RESPONSES:

ERROR: external_dial not valid - 7275551212|1|YES|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

ERROR: agent_user is not allowed to place manual dial calls - 6666

ERROR: caller_id_number from group_alias is not valid - 6666|TESTING|123

ERROR: group_alias is not valid - 6666|TESTING

ERROR: vtiger callback activity does not exist in vtiger system - 12345

ERROR: phone_number is already in this agents manual dial queue - 6666|7275551211

ERROR: lead_id is not valid - 6666|1234567

ERROR: phone number is not valid - 6666||1234567|

SUCCESS: external_dial function set - 7275551212|6666|1|YES|NO|YES|123456|1232020456|9|TESTING|7275551211|

external_add_lead

Adds a lead in the manual dial list of the campaign for logged-in agent. A much simplified add lead function compared to the Non-Agent API function

VALUES:

agent_user - REQUIRED - alphanumeric string for agent user

dnc_check - OPTIONAL - Check for number against system DNC

campaign_dnc_check - OPTIONAL - Check for number against campaign DNC from the agent's campaign

LEAD DATA (must populate at least one)

NOTE: Only fields that are specified in the API call will be modified

- address1
- address2
- address3
- alt_phone
- city
- comments
- country_code
- date_of_birth
- email
- first_name
- gender
- gmt_offset_now
- last_name
- middle_initial
- phone_number
- phone_code
- postal_code
- province
- security_phrase
- source_id
- state
- title
- vendor_lead_code
- rank
- owner

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_add_lead&phone_number=7275551212&phone_code=1&first_name=Bob&last_name=Smith=NO&dnc_check=YES)

[source=test&user=6666&pass=1234&agent_user=1000&function=external_add_lead&phone_number=7275551212&phone_code=1&first_name=Bob&last_name=Smith=NO&dnc_check=YES](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=external_add_lead&phone_number=7275551212&phone_code=1&first_name=Bob&last_name=Smith=NO&dnc_check=YES)

RESPONSES:

ERROR: external_add_lead not valid - 7275551212|1|6666|

ERROR: no user found - 6666

ERROR: lead insertion failed - 7275551212|TESTCAMP|101|6666

ERROR: add_lead PHONE NUMBER IN DNC - 7275551212|6666
ERROR: add_lead PHONE NUMBER IN CAMPAIGN DNC - 7275551212|TESTCAMP|6666
ERROR: campaign manual dial list undefined - 7275551212|TESTCAMP|6666
ERROR: agent_user is not logged in - 6666
SUCCESS: lead added - 7275551212|TESTCAMP|101|123456|6666

change_ingroups

This function will change the selected in-groups for an agent that is logged into a campaign that allows for inbound calls to be handled. It allows the selected in-groups for an agent to be changed while they are logged-in to the ViciDial Agent screen only. Once changed in this way, the agent would need to log out and back in to be able to select in-groups themselves (If Agent Choose In-Groups is enabled for that user). The blended checkbox can also be changed using this function. The API user performing this function must have `vicidial_users.change_agent_campaign = 1`.

VALUES:

value -

CHANGE - will change all in-groups to those defined in `ingroup_choices`

REMOVE - will only remove the listed in-groups

ADD - will only add the listed in-groups

blended -

YES - set the agent to take outbound auto-dialed calls (not applicable in MANUAL and INBOUND_MAN dial method campaigns)

NO - set the agent to only take inbound calls `ingroup_choices` -

OPTIONAL, a space-delimited (use plusses + in the URL) list of in-groups to allow the agent to take calls from, example: "TEST_IN2 SALESLINE TRAINING_IN -" `set_as_default`

OPTIONAL, YES or NO - overwrites the settings for the agent in the user modification screen, default is NO

EXAMPLE URLS:

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=CHANGE&set_as_default=YES&blended=YES&ingroup_choices=+TEST_IN+SALESLINE+FAKE_IN+-`

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=REMOVE&blended=NO&ingroup_choices=+TEST_IN2+TEST_IN4+-`

`http://server/agc/api.php?`

`source=test&user=6666&pass=1234&agent_user=1000&function=change_ingroups&value=ADD&blended=NO&ingroup_choices=+TEST_IN2+-`

RESPONSES:

ERROR: change_ingroups not valid - N| TEST_IN SALESLINE -

ERROR: agent_user is not logged in - 6666

ERROR: campaign does not allow inbound calls - 6666

ERROR: user is not allowed to change agent in-groups - 6666|TESTING|123

ERROR: campaign dial_method does not allow outbound autodial - 6666|TESTING

ERROR: ingroup does not exist - FAKE_IN| TEST_IN FAKE_IN SALESLINE -

ERROR: ingroup_choices are required for ADD and REMOVE values - ADD|
SUCCESS: change_ingroups function set - YES| TEST_IN SALESLINE -|6666

update_fields

Updates the fields that are specified with the values. This will update the data that is on the agent's screen in the customer information section.

VALUES:

agent_user - REQUIRED alphanumeric string for agent user

LEAD DATA (must populate at least one)

NOTE: Only fields that are specified in the API call will be modified

- address1
- address2
- address3
- alt_phone
- city
- comments
- country_code
- date_of_birth
- email
- first_name
- gender
- gmt_offset_now
- last_name
- middle_initial
- phone_number
- phone_code
- postal_code
- province
- security_phrase
- source_id
- state
- title
- vendor_lead_code
- rank
- owner

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&function=update_fields&agent_user=6666&vendor_lead_code=1234567&address1=)

[source=test&user=6666&pass=1234&function=update_fields&agent_user=6666&vendor_lead_code=1234567&address1=](http://server/agc/api.php?source=test&user=6666&pass=1234&function=update_fields&agent_user=6666&vendor_lead_code=1234567&address1=)

RESPONSES:

ERROR: update_fields not valid - 6666

ERROR: agent_user is not logged in - 6666

ERROR: user is not allowed to modify lead information - 6666|1234

ERROR: agent_user does not have a lead on their screen - 6666|1234

ERROR: no fields have been defined - 6666

SUCCESS: update_fields lead updated - 6666|1234|87498|vendor_lead_code='1234567',address1=""

set_timer_action

Updates the fields that are specified with the values. This will update the data that is on the agent's screen in the customer information section.

VALUES:

agent_user - REQUIRED, alphanumeric string for agent user

value - REQUIRED, one of these choices:

'NONE','WEBFORM','WEBFORM2','D1_DIAL','D2_DIAL','D3_DIAL','D4_DIAL','D5_DIAL'
'MESSAGE_ONLY'

notes - Optional, the message to be displayed with the timer action

rank - Optional, the number of seconds into the call to display

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&function=set_timer_action&agent_user=6666&value=MESSAGE_ONLY¬es=test+message&rank=15)

[source=test&user=6666&pass=1234&function=set_timer_action&agent_user=6666&value=MESSAGE_ONLY¬es=test+message&rank=15](http://server/agc/api.php?source=test&user=6666&pass=1234&function=set_timer_action&agent_user=6666&value=MESSAGE_ONLY¬es=test+message&rank=15)

RESPONSES:

ERROR: set_timer_action not valid - 6666

ERROR: agent_user is not logged in - 6666

ERROR: user is not allowed to modify campaign settings - 6666|1234

SUCCESS: set_timer_action lead updated - 6666|1234|MESSAGE_ONLY|test message|15

st_login_log

Looks up the vicidial_users.custom_three field (as "agentId") to associate with a vicidial user ID. If found it will populate the custom_four field with a "teamId" value, then output the vicidial user ID

VALUES:

value - REQUIRED alphanumeric string for CRM AgentID

vendor_id - REQUIRED alphanumeric string for CRM TeamID

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_login_log&value=876543&vendor_id=207)

[source=test&user=6666&pass=1234&function=st_login_log&value=876543&vendor_id=207](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_login_log&value=876543&vendor_id=207)

RESPONSES:

ERROR: st_login_log not valid - 6666|207

ERROR: no user found - 6666

SUCCESS: st_login_log user found - 6666

st_get_agent_active_lead

Looks up the vicidial_users.custom_three field(as "agentId") to associate with a vicidial user ID. If found it will output the active lead_id and phone number, vendor_lead_code, province, security_phrase and source_id fields.

VALUES:

value - REQUIRED alphanumeric string for CRM AgentID

vendor_id - REQUIRED alphanumeric string for CRM TeamID

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_get_agent_active_lead&value=876543&vendor_id=207)

[source=test&user=6666&pass=1234&function=st_get_agent_active_lead&value=876543&vendor_id=207](http://server/agc/api.php?source=test&user=6666&pass=1234&function=st_get_agent_active_lead&value=876543&vendor_id=207)

RESPONSES:

ERROR: st_get_agent_active_lead not valid - 6666|207

ERROR: no user found - 6666

ERROR: user not logged in - 6666

ERROR: no active lead found - 6666

SUCCESS: st_get_agent_active_lead lead found - 6666|7275551212|123456|9987-1234765|

SK|WILLIAMS|JUH764AJJ9

ra_call_control

Allows for remote agent call control: hangup/transfer calls being handled by remote agents, also options for recording a disposition and call length

VALUES:

value - REQUIRED, The call ID of the call as received as CallerIDname field or a special SIP-header, i.e. Y0315201639000402027

agent_user - REQUIRED, alphanumeric string for remote agent user

stage - REQUIRED, one of these choices:

'HANGUP','EXTENSIONTRANSFER','INGROUPTRANSFER'

ingroup_choices - OPTIONAL, only required if INGROUPTRANSFER stage is used, must be a single activein-group, reserved option of "DEFAULTINGROUP" can be used to send the call to the default in-group for the in-group or campaign that originated the call to the remote agent

phone_number - OPTIONAL, only required if EXTENSIONTRANSFER stage is used, must be a full number when dialed that will dial through the default context

status - OPTIONAL, status of the call, maximum of 6 characters, if not set, status will be RAXFER

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1028&function=ra_call_control&stage=INGROUPTRANSFER&ingroup_choices=DEFAULTINGROUP&value=Y0316001655000402028)

[source=test&user=6666&pass=1234&agent_user=1028&function=ra_call_control&stage=INGROUPTRANSFER&ingroup_choices=DEFAULTINGROUP&value=Y0316001655000402028](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1028&function=ra_call_control&stage=INGROUPTRANSFER&ingroup_choices=DEFAULTINGROUP&value=Y0316001655000402028)

RESPONSES:

ERROR: ra_call_control not valid - Y0315201639000402027|6666|INGROUPTRANSFER

ERROR: no user found - 6666
ERROR: user not logged in - 6666
ERROR: no active call found - Y0315201639000402027
ERROR: phone_number is not valid - 9
ERROR: ingroup is not valid - TESTINGROUP
ERROR: stage is not valid - XYZ
SUCCESS: ra_call_control transferred - 6666|Y0315201639000402027|SALESLINE
SUCCESS: ra_call_control hungup - 6666|Y0315201639000402027|HANGUP

send_dtmf

Sends dtmf signal string to agent's session

VALUES: (value) only valid DTMF characters with these replacements:

P = # (pound or hash)

S = * (star)

Q = (one second of silence)

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=send_dtmf&value=QQQQ1234SQQQQ6654P)

[source=test&user=6666&pass=1234&agent_user=1000&function=send_dtmf&value=QQQQ1234SQQQQ6654P](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=send_dtmf&value=QQQQ1234SQQQQ6654P)

RESPONSES:

ERROR: send_dtmf not valid - QQ|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

SUCCESS: send_dtmf function set - QQQQ1234SQQQQQ6654P|6666

park_call

Sends command to park customer or grab customer out of park

VALUES:

value - REQUIRED, choices are below

PARK_CUSTOMER - send customer to the park extension as defined in the campaign
the agent is logged into

GRAB_CUSTOMER - grab customer from the park extension and send them to the agent
session

PARK_IVR_CUSTOMER - send customer to the park ivr as defined in the campaign the
agent is logged into, customer will come back after finishing IVR

GRAB_IVR_CUSTOMER - grab customer from the park ivr and send them to the agent
session

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_CUSTO)

[source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_CUSTO](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_CUSTO)

MER

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_CUSTO)

source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_CUSTO
MER

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_IVR_C)

source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=PARK_IVR_C
USTOMER

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_IVR_C)

source=test&user=6666&pass=1234&agent_user=1000&function=park_call&value=GRAB_IVR_C
USTOMER

RESPONSES:

ERROR: park_call not valid - PARK_CUSTOMER|6666

ERROR: no user found - 6666

ERROR: agent_user is not logged in - 6666

ERROR: agent_user does not have a lead on their screen - 6666

SUCCESS: park_call function set - PARK_CUSTOMER|6666

transfer_conference

Sends several commands related to the agent transfer-conf frame

VALUES:

value - REQUIRED, choices are below

HANGUP_XFER - hangup the third party line

HANGUP_BOTH - hangup customer and third party line

BLIND_TRANSFER - send a call to a defined phone number

LEAVE_VM - blind transfer customer to the campaign-defined voicemail message

LOCAL_CLOSER - send call to another ViciDial agent, must have in-group, optional
phone_number field for AGENTDIRECT agent

DIAL_WITH_CUSTOMER - 3-way call with customer on the line

PARK_CUSTOMER_DIAL - send customer to park and place a call to a third party

LEAVE_3WAY_CALL - leave customer and third party in conference and go to the
disposition screen

phone_number - OPTIONAL/REQUIRED, required for any transfer or dial value

ingroup_choices - OPTIONAL/REQUIRED, required for local_closer and consultative transfers, must
be a single active in-group, reserved option of "DEFAULTINGROUP" can be used to select the default
in-group for the in-group or campaign that the call originated from

consultative - OPTIONAL, when you want to do a consultative transfer with your customer and
another ViciDial agent, 'YES' and 'NO' are valid options, you can only use this with
DIAL_WITH_CUSTOMER or PARK_CUSTOMER_DIAL

dial_override - OPTIONAL, dials exactly the phone number specified with no campaign-defined
phone code or prefix

EXAMPLE URLS:

[http://server/agc/api.php?](http://server/agc/api.php?source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=)

source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=

HANGUP_XFER

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
HANGUP_BOTH

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
BLIND_TRANSFER&phone_number=8500

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
LEAVE_VM

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
LOCAL_CLOSER&ingroup_choices=DEFAULTINGROUP

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
LOCAL_CLOSER&ingroup_choices=AGENTDIRECT&phone_number=6666

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
LOCAL_CLOSER&ingroup_choices=SALESLINE

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
DIAL_WITH_CUSTOMER&ingroup_choices=TEST_IN3&consultative=YES

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
DIAL_WITH_CUSTOMER&phone_number=8500

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
DIAL_WITH_CUSTOMER&phone_number=919998888112&dial_override=YES

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
PARK_CUSTOMER_DIAL&ingroup_choices=TEST_IN3&consultative=YES

http://server/agc/api.php?
source=test&user=6666&pass=1234&agent_user=1000&function=transfer_conference&value=
LEAVE_3WAY_CALL

RESPONSES:

ERROR: transfer_conference not valid - QQ|6666

ERROR: value is not valid - XYZFUNCTION|6666

ERROR: no user found - 6666

ERROR: ingroup is not valid - XYZINGROUP

ERROR: agent_user is not logged in - 6666

ERROR: agent_user does not have a live call - 6666

SUCCESS: transfer_conference function set - LOCAL_CLOSER|SALESLINE||YES|6666

FREQUENTLY ASKED QUESTIONS

Why can't my agents log in to the campaign until 9AM?

If there are no leads in the dial hopper for a campaign, then no agents are allowed to log in to the campaign. Since most campaigns in the USA will use the 9am-9pm call time definition, there will be no leads loaded with this definition for the campaign until it is 9:00:00 AM in the first time zone that you have leads for.

Why can't I use spaces, dashes or other special characters in some form fields?

This is for security and data integrity reasons. Putting certain combinations of special non letter or number characters in a login prompt for instance can corrupt or delete data in the system. VICIdial filters many fields so that these characters are removed and can cause no harm to the system.

Why are there two agents in the same session talking to each other?

This usually happens when one of the agents does not log out properly or does not hang up their phone when they log out. When an agent is done and wants to log out, it is very important that they click on the LOGOUT link at the top of their agent screen.

APPENDIX

Additional Screen-shots

VICIdial ADMINISTRATION HOME | Timesheet | Agent Status | User Status | Time Sheet | Days Status Thursday April 26, 2012 10:44:44 AM

Users MODIFY A USER'S RECORD: 6666

Users
SHOW USERS
ADD A NEW USER
COPY USER
SHOW LOG A USER
User Status
User Status
Time Sheet
User Territories

Campaigns
Lists
Scripts
Filters
Inbound
User Groups
Remote Agents
Admin
Reports

User Number: 6666 Password: 1234 Strength: **Weak**

Force Change Password: ☐ Full Name: Admin

User Level: 0 User Group: ADMIN

Phone Login: Phone Pass:

Active: ☒ Voicemail ID: Voicemail Address:

Email: User Code:

Main Territory: User Territory:

AGENT INTERFACE OPTIONS:

Agent Choose Impromptu: ☐ Agent Choose Blended: ☐ Agent Choose Territories: ☐ Hot Keys Active: ☐ Scheduled Callbacks: ☐ Agent-Only Callbacks: ☐ Agent Call Manual: ☐ Voicemail Recording: ☐ Voicemail Transfer: ☐ Close Default Blended: ☐ VIRTUAL Recording Override: ☐ Agent Alter Customer Data Override: ☐ Agent Alter Customer Phone Override: ☐ Agent Shift Enforcement Override: ☐ Agent Call Log View Override: ☐ Agent Lead Search Override: ☐ Alert Ranked: ☐ Allow Alerts: ☐ Prevent Contact Search: ☐ Campaign Rank: ☐ WEB VARS:

CAMPAIGN: RANK: GRADE: CALLS:

1000 - TestCamp

INBOUND GROUP: ☐ Inbound Group: RANK: GRADE: CALLS: WEB VARS:

☐ AGENT OBJECT - Single Agent Direct Queue

Custom 1: Custom 2: Custom 3: Custom 4: Custom 5:

ADMIN REPORT OPTIONS:

Realtime Block User Info: ☐ Admin Hide Lead Data: ☐ Admin Hide Phone Data: ☐

ADMIN INTERFACE OPTIONS:

View Reports: ☐ Alter Agent Interface Options: ☐ Modify Users: ☐ Change Agent Campaign: ☐ Delete Users: ☐ Modify User Groups: ☐ Delete User Groups: ☐ Modify Lists: ☐ Delete Lists: ☐ Load Leads: ☐ Modify Leads: ☐ Download Lists: ☐ Export Reports: ☐ Delete From DNC Lists: ☐ Custom Fields Modify: ☐ Modify Campaigns: ☐ Campaign Detail: ☐ Delete Campaigns: ☐ Modify In-Groups: ☐ Delete In-Groups: ☐ Modify DID's: ☐ Delete DID's: ☐ Modify Remote Agents: ☐ Delete Remote Agents: ☐ Modify Scripts: ☐ Delete Scripts: ☐ Modify Filters: ☐ Delete Filters: ☐ AGC Admin Access: ☐ AGC Delete Phones: ☐ Modify Call Times: ☐ Delete Call Times: ☐ Modify Servers: ☐ Modify Shifts: ☐ Modify Phones: ☐ Modify Carriers: ☐ Modify Labels: ☐ Modify States: ☐ Modify Voicemail: ☐ Modify Audio Store: ☐ Modify Music On Hold: ☐ Modify TTS: ☐ Modify Contacts: ☐ Call/Call Access: ☐ Agent API Access: ☐ Add Timesheet Log Record: ☐ Modify Timesheet Log Record: ☐ Delete Timesheet Log Record: ☐ Manager Shift Enforcement Override: ☐ Modify Swap User Level: ☐

[DELETE THIS USER](#)
[Click here for user time sheet](#)
[Click here for user status](#)
[Click here for user status](#)
[Click here for user status detail report](#)
[Click here for user CallBack 7000](#)
[Click here for user Admin Changes to this record](#)

REVISION 14.004
BUILD: 10000-11M
8/20/10/10/10/10

Figure 70. VICIdial User Modification Page

HOME | 1 message | 1 lead (99%) Thursday April 26, 2012 10:50:43 AM
 Show Campaigns | Add A New Campaign | Copy Campaign | Real-Time Campaigns Summary

1000 Basic Detail Statistics History Lead Recording Auto Att Dial List Mfr Survey Pause Codes AC-CD Real-Time

Campaigns
 Campaigns Main
 Statistics
 History
 Lead Recording
 Auto Att Dial
 List Mfr
 Pause Codes
 Assets
 AC-CD

Users
 Lists
 Scripts
 Filters
 Inbound
 User Groups
 Remote Agents
 Admin
 Reports

Campaign ID: 1000 ?
 Campaign Name: TestCamp ?
 Campaign Description: test campaign ?
 Campaign Change Date: 2012-04-24 14:30:29 ?
 Campaign Login Date: ?
 Campaign Call Date: ?
 Active: Y ?
 Admin User Group: --ALL-- ?
 Park Music-On-Hold: moh chooser ?
 Web Form: ?
 Web Form Two: ?
 Web Form Target: idoveform ?
 Allow Closers: Y ?
 Allow Inbound and Blended: N ?
 Dial Status 1: NEW - New Lead REMOVE
 Add A Dial Status to Call: --NONE-- ADD ?
 List Order: DOWN ?
 List Order Randomize: N ?
 List Order Secondary: LEAD_ASCEND ?
 List Mfr: DISABLED - DISABLED ?
 Lead Filter: NONE ?
 Drop Lockout Time: 0 ?
 Call Count Limit: 0 ?
 Call Count Target: 0 ?
 Minimum Hopper Level: 1 ?
 Automatic Hopper Level: Y ?
 Automatic Hopper Multiplier: 1 ?
 Auto Trim Hopper: Y ?
 Hopper VLC Dup Check: N ?
 Force Reset of Hopper: N ?
 Dial Method: MANUAL ?
 Auto Dial Level: 1 (0 = off) ? ADAPT OVERRIDE
 Auto Dial Level Threshold: DISABLED ? agents: 0 ?
 Available Only Tally: N ?
 Available Only Tally Threshold: DISABLED ? agents: 0 ?
 Drop Percentage Limit: 0 % ?
 Maximum Auto Dial Level: 10 number only ?
 Latest Server Time: 2100 4 digits only ?
 Adapt Intensity Modifier: 0 - Balanced ?
 Dial Level Difference Target: 0 - 0 Balanced ?
 Dial Level Difference Target Method: ADAPT_CALC_ONLY ?
 Concurrent Transfers: AUTO ?
 Queue Priority: 50 - Higher ?
 Multiple Campaign Drop Rate Group: DISABLED ?
 Inbound Queue No Dial: DISABLED ?
 Auto Att-Number Dialing: NONE ?
 Next Agent Call: random ?
 Local Call Time: 24 hours - default 24 hours calling ?
 Dial Timeout: 60 in seconds ?
 Dial Prefix: 9 ?
 Manual Dial Prefix: ?
 Omit Phone Code: N ?
 Campaign CallerID: 0000000000 ?
 Custom CallerID: N ?
 Routing Extension: 8308 ?
 Campaign Rec exten: 8308 ?
 Campaign Recording: ONDEMAND ?
 Campaign Rec Filename: FULLDATE_CUSTPHONE ?
 Recording Delay: 0 in seconds ?
 Call Notes Per Call: DISABLED ?
 Agent Lead Search: DISABLED ?
 Agent Lead Search Method: CAMPLISTS_ALL ?
 Script: - ?
 Get Call Launch: NONE ?
 Answering Machine Message: m-goodbye audio chooser ?
 WaitForSilence Options: ?
 AMD Send to VM exten: N ?
 CPD AMD Action: DISABLED ?
 Transfer-Conf DTMF 1: ?
 Transfer-Conf Number 1: ?
 Transfer-Conf DTMF 2: ?
 Transfer-Conf Number 2: ?
 Transfer-Conf Number 3: ?
 Transfer-Conf Number 4: ?
 Transfer-Conf Number 5: ?
 Enable Transfer Presets: DISABLED ?
 Hide Transfer Number to Dial: DISABLED ?
 Quick Transfer Button: N ?
 Custom 3-Way Button Transfer: DISABLED ?
 PrePopulate Transfer Preset: N ?
 Park Call IVR: DISABLED ?
 Park Call IVR AGI: ?
 Timer Action: NONE ?
 Timer Action Message: ?
 Timer Action Seconds: -1 ?
 Timer Action Destination: ?
 Att Number Dialing: N ?
 Scheduled Callbacks: N ?
 Scheduled Callbacks Alert: NONE ?
 Scheduled Callbacks Count: ALL_ACTIVE ?
 Scheduled Callbacks Days Limit: 0 ?
 Scheduled Callbacks Hours Block: ?
 Scheduled Callbacks Calltime Block: DISABLED ?
 My Callbacks Checkbox Default: UNCHECKED ?

Drop Call Seconds: 5 ?
 Drop Action: AUDIO ?
 Safe Harbor Exten: 8307 ?
 Safe Harbor Audio: buzz audio chooser ?
 Safe Harbor Call Menu: ?
 Voicemail: --NONE-- ?
 Drop Transfer Group: DISPO_ENABLED ?
 Disable Dispo Status: ?
 Wrap Up Seconds: 0 ?
 Wrap Up Message: ?
 Use Internal DNC List: N ?
 Use Campaign DNC List: N ?
 Agent Pause Codes Active: N ?
 Auto Pause Pre-Call Work: N ?
 Auto Resume Pre-Call Work: N ?
 Auto Pause Pre-Call Code: PRECALL ?
 Campaign Stats Refresh: Y ?
 Real-Time Agent Time Stats: CALLS_WAIT_CUST_ADV_PAUSE ?
 Disable Alter Customer Data: N ?
 Disable Alter Customer Phone: Y ?
 Allow No-Hopper-Leads Logins: N ?
 No Hopper Dialing: N ?
 Owner Only Dialing: NONE ?
 Agent Select Territories: N ?
 Agent Display Dialable Leads: N ?
 Agent Screen Labels: --SYSTEM-SETTINGS-- ?
 Status Display Fields: CALLED ?
 Agent Display Queue Count: Y ?
 Agent View Calls in Queue: NONE ?
 View Calls in Queue Launch: MANUAL ?
 Agent Grab Calls in Queue: N ?
 Agent Call Re-Queue Button: N ?
 Agent Pause After Each Call: N ?
 Manual Dial Override: NONE ?
 Manual Dial List ID: 88 ?
 Manual Dial Filter: NONE ?
 Manual Preview Dial: PREVIEW_AND_SKIP ?
 Manual Call Time Check: DISABLED ?
 Manual Dial API: STANDARD ?
 Manual Dial CID: CAMPAIGN ?
 Phone Post Time Difference Alert: DISABLED ?
 Agent Screen Clipboard Copy: NONE ?
 Agent Screen Extended Alt Dial: N ?
 3-Way Call Outbound CallerID: CAMPAIGN ?
 3-Way Call Dial Prefix: ?
 Customer 3-Way Hangup Logging: ENABLED ?
 Customer 3-Way Hangup Seconds: 5 ?
 Customer 3-Way Hangup Action: NONE ?
 Group Alias Allowed: N ?
 CRM Popup Login: N ?
 CRM Popup Address: ?
 Start Call URL: ?
 Dispo Call URL: ?
 No Agent Call URL: N ?
 Extension Append CID: N ?
 Blind Monitor Warning: DISABLED ?
 Blind Monitor Notice: Someone is blind monitoring your session ?
 Blind Monitor Filename: audio chooser ?
 Default Transfer Group: --NONE-- ?
 Allowed Transfer Groups: ?
 AGENTDIRECT - Single Agent Direct Queue
 SUBMIT

LISTS WITHIN THIS CAMPAIGN: ?

LIST ID	LIST NAME	DESCRIPTION	LEADS COUNT	ACTIVE	LAST CALL DATE	MODIFY
88	Default Inbound List		0	Y	CP	Modify...

SUBMIT ACTIVE LIST CHANGES

This campaign has 1 active lists and 0 inactive lists
[SHOW/LOG STATISTICS IN THIS CAMPAIGN](#)

This campaign has 0 leads to be dialed in those lists - **INC**
 This campaign has 0 leads in the dial hopper
[Click here to see what leads are in the hopper right now](#)
[Click here to see a VBAD report for this campaign](#)
[Click here to see all CallBack Holds in this campaign](#)

Test Outbound Call: code: number: PLACE TEST CALL ?

[Click here to see Admin changes to this campaign](#)

LOG ALL AGENTS OUT OF THIS CAMPAIGN

DELETE THIS CAMPAIGN

Figure 71. VICdial Campaign Modification Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

[Show Campaigns](#) | [Add A New Campaign](#) | [Copy Campaign](#) | [Real-Time Campaigns Summary](#)

Thursday April 26, 2012 10:51:40 AM

1000:

[Basic](#) | [Detail](#) | [Statuses](#) | [Hotkeys](#) | [Lead Recycling](#) | [Auto Alt Dial](#) | [List Mix](#) | [Survey](#) | [Pause Codes](#) | [AC-CID](#) | [Real-Time](#)

Users

Campaigns

[Campaigns Main](#)

[Statuses](#)

[Hotkeys](#)

[Lead Recycle](#)

[Auto-Alt Dial](#)

[List Mix](#)

[Pause Codes](#)

[Presets](#)

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Inbound

User Groups

Remote Agents

Admin

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CUSTOM STATUSES WITHIN THIS CAMPAIGN: ?

STATUS	DESCRIPTION	CATEGORY	MODIFY/DELETE
AGENT	HUMAN		
SELECTABLE	ANSWER		
UNWORKABLE	CALLBACK		
COMPLETED	NOT INTERESTED		
SCHEDULED	CUSTOMER CONTACT		

ADD NEW CUSTOM CAMPAIGN STATUS

Status:

Description:

Selectable: Y

Human Answer: N

Sale: N

DNC: N

Customer Contact: N

Not Interested: N

Unworkable: N

Callback: N

Completed: N

Category: -

ADD

Figure 72. VICdial Campaign Statuses Page

2012-04-29 version

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[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 10:55:03 AM

CAMPAIGN HOT KEY ADDED: 1000 - SALE - 2 1000:

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
[AC-CID](#)
[Real-Time](#)

CUSTOM HOT KEYS WITHIN THIS CAMPAIGN: ?

HOT KEY	STATUS	DESCRIPTION	DELETE
1	A	Answering Machine	DELETE
2	SALE	Sale Made	DELETE

ADD NEW CUSTOM CAMPAIGN HOT KEY

Hotkey:
Status:

Users

Campaigns

[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
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[Remote Agents](#)
[Admin](#)
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Figure 73. VICdial Campaign HotKeys Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 10:56:12 AM

CAMPAIGN LEAD RECYCLE ADDED: 1000 - AB - 1800 1000:

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
[AC-CID](#)
[Real-Time](#)

LEAD RECYCLING WITHIN THIS CAMPAIGN: ?

STATUS	ATTEMPT DELAY	ATTEMPT MAXIMUM	LEADS AT LIMIT	ACTIVE	DELETE
AB	1800	2	0	N	MODIFY DELETE

ADD NEW CAMPAIGN LEAD RECYCLE

Status:
Attempt Delay:
Attempt Maximum:

* Lead counts taken from active lists in the campaign only.

Users

Campaigns

[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
[List Mix](#)
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[AC-CID](#)

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[Scripts](#)
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[Admin](#)
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Figure 74. VICdial Campaign Lead Recycling Page

[Users](#)
[Campaigns](#)
[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
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[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

[Show Campaigns](#) | [Add A New Campaign](#) | [Copy Campaign](#) | [Real-Time Campaigns Summary](#)

1000:

[Basic](#)
[Detail](#)
[Statuses](#)
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[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
[AC-CID](#)
[Real-Time](#)

AUTO ALT NUMBER DIALING FOR THIS CAMPAIGN: ?

STATUSES
DELETE

B	DELETE
N	DELETE
NA	DELETE
DC	DELETE

ADD NEW AUTO ALT NUMBER DIALING STATUS

Status:

Figure 75. VICIdial Campaign Auto Alt-Dial Page

[Users](#)
[Campaigns](#)
[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
[List Mix](#)
[Pause Codes](#)
[Presets](#)
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[Remote Agents](#)
[Admin](#)
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[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

[LIST MIX MODIFIED: 1000 - TestMix - 999 1000:](#)

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
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[Real-Time](#)

LIST MIXES FOR THIS CAMPAIGN: ?

WARNING, we only recommend List Mix for advanced users, Please read the ViciDial Manager Manual

TestMix: [DELETE LIST MIX](#)

Status: **INACTIVE** [SET TO ACTIVE](#) Method:

LIST ID	PRIORITY	%	MIX	STATUSES
List: 999 REMOVE	1	40	A -	- Select A Status - ADD REMOVE
List: 998 REMOVE	10	25	AB AA -	- Select A Status - ADD REMOVE
List: 999 REMOVE	10	35	DROP NA -	- Select A Status - ADD REMOVE

Difference %:

List:

NEW -

[ADD](#) [REMOVE](#)

ADD NEW LIST MIX

Mix ID: Mix Name: Mix Method:

List: Dial Status:

Figure 76. VICIdial Campaign List Mix Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 10:59:04 AM

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
[AC-CID](#)
[Real-Time](#)

AGENT PAUSE CODE ADDED: 1000 - Train - Training Time 1000:

[Users](#)

[Campaigns](#)

[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
[List Mix](#)
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[Presets](#)
[AC-CID](#)

[Lists](#)
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[Inbound](#)
[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

AGENT PAUSE CODES FOR THIS CAMPAIGN: ?

PAUSE CODES	BILLABLE	MODIFY	DELETE
Break Break time	YES	MODIFY	DELETE
Lunch Lunch Time	NO	MODIFY	DELETE
Train Training Time	HALF	MODIFY	DELETE

ADD NEW AGENT PAUSE CODE

Pause Code:
Pause Code Name:
Billable: YES
ADD

Figure 77. VICdial Campaign Pause Codes Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 11:17:51 AM

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
[Pause Codes](#)
[Presets](#)
[AC-CID](#)
[Real-Time](#)

PRESET ADDED: 1000 - TPV - 3055551000 1000:

[Users](#)

[Campaigns](#)

[Campaigns Main](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycle](#)
[Auto-Alt Dial](#)
[List Mix](#)
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1 PRESETS FOR THIS CAMPAIGN: ?

ADD NEW PRESET -

Preset Name:
Number:
DTMF:
Hide Number: N
ADD

#	PRESET NAME	NUMBER	DTMF	HIDE	MODIFY	DELETE
1	TPV	3055551000	2	N	MODIFY	DELETE

Figure 78. VICdial Campaign Presets

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 11:15:46 AM

AREACODE CID ADDED: 1000 - 770 - 7705551000

1000:

[Basic](#)
[Detail](#)
[Statuses](#)
[HotKeys](#)
[Lead Recycling](#)
[Auto Alt Dial](#)
[List Mix](#)
[Survey](#)
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[Presets](#)
[AC-CID](#)
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Users

Campaigns

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[AC-CID](#)

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Inbound

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Admin

Reports

AREACODE CIDS FOR THIS CAMPAIGN: ?

#	AREACODE	CID NUMBER	DESCRIPTION	ACTIVE	CALLS	DELETE
1	770	7705551000	Atlanta AC	☒	0	DELETE

SUBMIT CHANGES

ADD NEW AREACODE CID

Areacode:
Outbound CID:

Description:

Figure 79. VICIdial Campaign AC-CID

VICdial
ADMINISTRATION

[Users](#)
[Campaigns](#)
[Lists](#)
[Show Lists](#)
[Add A New List](#)
[Search For A Lead](#)
[Add A New Lead](#)
[Add DNC Number](#)
[Load New Leads](#)
[List Custom Fields](#)
[Copy Custom Fields](#)
[Scripts](#)
[Filters](#)
[Inbound](#)
[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

HOME | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 11:23:08 AM

Lead search: Thursday April 26, 2012 11:23:08 AM

Lead Search Options:

Vendor ID(vendor lead code):

SUBMIT

Phone:

SUBMIT

Alt. Phone search:

Lead ID:

SUBMIT

Status:

List ID:

SUBMIT

User:

First:

SUBMIT

Last:

Log Search Options:

Lead ID:

SUBMIT

Phone Dialed:

SUBMIT

Figure 81. VICdial List Search for a Lead

Add A New Lead

Lead ID: NEW List ID: 998 - 1000 - Default Manual list ▼

Frontier: Called Count:

Title: Ms. First: Lucy

MI: B Last: McGillicutty

Address1 : 123 Fake St.

Address2 : Apt. 3-D

Address3 :

City : Jamestown

State: NY Postal Code: 14701

Province :

Country : US

Phone : 716-555-1000

DialCode :

Alt. Phone :

Email :

Show :

Vendor ID :

Rank :

Owner : Ricardo Ricardo

Comments : Wants to be in the show; happy with current long distance carrier.

Figure 82. VICIdial List Add A New Lead



[Users](#)
[Campaigns](#)
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[Scripts](#)
[Filters](#)
[Inbound](#)
[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 16:36:22 PM

LIST LISTINGS WITH CUSTOM FIELDS COUNT:

LIST ID	LIST NAME	ACTIVE	CAMPAIGN	CUSTOM FIELDS	MODIFY
998	Default Mammal list	Y	1000	0	MODIFY FIELDS
999	Default inbound list	Y	1000	1	MODIFY FIELDS

runtime: 0 seconds Version: 2.4-16 Build: 120223-2315

LIST ID	LIST NAME	ACTIVE	CAMPAIGN	CUSTOM FIELDS	MODIFY
998	Default Mammal list	Y	1000	0	MODIFY FIELDS
999	Default inbound list	Y	1000	1	MODIFY FIELDS

```
runtime: 0 seconds      Version: 2.4-16      Build: 120223-2315
```

Figure 83. VICIdial List Custom Fields

Vici dial ADMINISTRATION Users Campaigns Lists Scripts Show Scripts Add A New Script Filters Inbound User Groups Remote Agents Admin Reports	HOME Timeclock Logout (0000) Thursday April 26, 2012 11:47:21 AM	
	MODIFY A SCRIPT	
	Script ID:	TEST ?
	Script Name:	Test Script (title of the script) ?
	Script Comments:	? ?
	Admin User Group:	AGENTS ?
	Active:	Y ?
		Agent Name Insert ?
	Script Text:	Hello, I am calling for --A--first_name--B-- there? Hi --A--title--B-- --A--last_name--B--, I am calling on behalf of Pet Shorts, LTD about an exciting new offer! Has your schnauzer or bulldog faced undue ridicule at the dog park lately? My name is --A--full_name--B-- and I can make your pooch feel all the confidence he deserves when meeting new canines.
	Preview Script	
SUBMIT		
CAMPAIGNS USING THIS SCRIPT:		
IN-GROUPS USING THIS SCRIPT:		
LIST OVERRIDES USING THIS SCRIPT:		
DELETE THIS SCRIPT		
Click here to see Admin changes to this script		

VERSION: 2.4.364,
BUILD: 120409-1136

Figure 84. VICIdial Script Modification Page

Figure 85. VICIdial Filter Modification Page

Figure 86. VICIdial Inbound In-group Modification Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 11:53:17 AM

DID REMOTE AGENT EXTENSION OVERRIDE ADDED: 2 - 1000 - 1000

REMOTE AGENT EXTENSION OVERRIDES FOR THIS DID: ?

#	USER START	EXTENSION	DESCRIPTION	ACTIVE	CALLS	DELETE
1	1000	1000	Asa Green from home	☒	0	DELETE

SUBMIT CHANGES

ADD NEW REMOTE AGENT EXTENSION OVERRIDE

User Start:

Extension:

Description:

ADD

[MODIFY THIS DID](#)
[Click here to see Admin changes to this DID](#)

Inbound

[Show In-Groups](#)
[Add A New In-Group](#)
[Copy In-Group](#)

[Show DIDs](#)
[Add A New DID](#)
[Copy DID](#)
[RA Extensions](#)

[Show Call Menus](#)
[Add A New Call Menu](#)
[Copy Call Menu](#)

[Filter Phone Groups](#)
[Add Filter Phone Group](#)
[Add-Delete FPG Number](#)

[User Groups](#)
[Remote Agents](#)
[Admin](#)
[Reports](#)

VERSION: 2.4-364a

BUILD: 120409-1136

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Figure 88. VICdial Inbound RA Extensions

Figure 89. VICIdial Inbound Call Menu Modification Page

- Users
- Campaigns
- Lists
- Scripts
- Filters
- Inbound
- User Groups**
 - Show User Groups
 - Add A New User Group
 - Group Hourly Report
 - Bulk Group Change
- Remote Agents
- Admin
- Reports

HOME | Timeclock | Logout (6666)

Thursday April 26, 2012 13:53:51 PM

Group Hourly Stats AGENTS

TSR HOUR COUNTS: [AGENTS](#) | [SALE](#) | 2012-04-26 13 | 2012-04-26

TSR	ID	SALE	TOTAL CALLS	SALE DAY	
300	Cyan Smith	0	0	0	MODIFY STATS
200	Betty Blue	0	0	0	MODIFY STATS
100	Asa Green	0	0	0	MODIFY STATS
TOTAL	SALE	0	0	0	

Please enter the group you want to get hourly stats for:

group: (example: XFER)

status: (example: 2004-06-25 14)

date with hour: (example: 2004-06-25 14)

script runtime: 0 seconds

Figure 92. VICdial User Groups Group Hourly Report Page

- Users
- Campaigns
- Lists
- Scripts
- Filters
- Inbound
- User Groups**
 - Show User Groups
 - Add A New User Group
 - Group Hourly Report
 - Bulk Group Change
- Remote Agents
- Admin
- Reports

HOME | Timeclock | Logout (6666)

Thursday April 26, 2012 13:54:36 PM

User Group Bulk Change

Change Users in this group:

to this group:

Change ALL non-Admin Users to this group:

script runtime: 0 seconds|||

Figure 93. VICdial User Groups Bulk Group Change

- [Users](#)
- [Campaigns](#)
- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)
- Remote Agents**
 - [Show Remote Agents](#)
 - [Add New Remote Agents](#)
 - [Show Extension Groups](#)
 - [Add Extension Group](#)
- [Admin](#)
- [Reports](#)

VERSION: 2.4-364a
 BUILD: 120409-1136
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HOME | [Timesclock](#) | [Logout](#) (6666)

Sunday April 29, 2012 10:45:43 AM

MODIFY A REMOTE AGENTS ENTRY: 1

[User ID Start:](#) 100 (numbers only, incremented, must be an existing vicdial user) ?

Number of Lines: 1 (numbers only) ?

Server IP: 10.10.10.15 ?

External Extension: 917275551111 (dial plan number dialed to reach agents) ?

Extension Group: NONE ?

Status: INACTIVE ?

[Campaign:](#) 1000 ?

On-Hook Agent: N ?

On-Hook Ring Time: 15 ?

Inbound Groups: ☐ [AGENTDIRECT](#) - Single Agent Direct Queue - 99 ?

SUBMIT

NOTE: It can take up to 30 seconds for changes submitted on this screen to go live

[THERE ARE 0 DID REMOTE AGENT EXTENSION OVERRIDES FOR THIS REMOTE AGENT](#)

[DELETE THIS REMOTE AGENT](#)

[Click here to see Admin changes to this remote agent](#)

Figure 94. VICdial Remote Agent Modification Page

- [Users](#)
- [Campaigns](#)
- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)
- Remote Agents**
 - [Show Remote Agents](#)
 - [Add New Remote Agents](#)
 - [Show Extension Groups](#)
 - [Add Extension Group](#)
- [Admin](#)
- [Reports](#)

VERSION: 2.4-364a
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HOME | [Timesclock](#) | [Logout](#) (6666)

Thursday April 26, 2012 13:57:02 PM

EXTENSION GROUP LISTINGS:

GROUP	EXTENSION	RANK	RESTRICT	COUNT	LAST CALL	LAST ID	MODIFY
2222	200	0		0			MODIFY

Figure 95. VICdial Remote Agent Show Extension Groups Page

ADMINISTRATION

Users

Campaigns

Lists

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

Call Times

Shifts

Phones

Templates

Carriers

Servers

Conferences

System Settings

Screen Labels

System Statuses

Voicemail

Audio Store

Music On Hold

Text To Speech

CallCard Admin

Contacts

Reports

HOME | Timeclock | Logout (6466)

Thursday April 26, 2012 13:58:02 PM

Show Call Times | Add A New Call Time | Show State Call Times | Add A New State Call Time

MODIFY A CALL TIME

Call Time ID: 12pm-5pm ?

Call Time Name: default 12pm to 5pm calling (short description of the call time) ?

Call Time Comments: ?

Admin User Group: ---ALL---

Default Start: 1200	Default Stop: 1700 ?	AH Override: audio chooser ?
Sunday Start: 0	Sunday Stop: 0 ?	AH Override: audio chooser ?
Monday Start: 0	Monday Stop: 0 ?	AH Override: audio chooser ?
Tuesday Start: 0	Tuesday Stop: 0 ?	AH Override: audio chooser ?
Wednesday Start: 0	Wednesday Stop: 0 ?	AH Override: audio chooser ?
Thursday Start: 0	Thursday Stop: 0 ?	AH Override: audio chooser ?
Friday Start: 0	Friday Stop: 0 ?	AH Override: audio chooser ?
Saturday Start: 0	Saturday Stop: 0 ?	AH Override: audio chooser ?

SUBMIT

Active State Call Time Definitions for this Record:

Add state call time rule:

alabama - Alabama 8am-8pm and Sunday

SUBMIT

CAMPAIGNS USING THIS CALL TIME:

INBOUND GROUPS USING THIS CALL TIME:

DELETE THIS CALL TIME DEFINITION

Click here to see Admin changes to this call time

VERSION: 2.4.364a

BUILD: 120402-1156

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Figure 96. Admin Call Times Modification Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 13:59:02 PM

[Show Shifts](#) | [Add A New Shift](#)

Users

Campaigns

Lists

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

Call Times

Shifts

Phones

Templates

Carriers

Servers

Conferences

System Settings

Screen Labels

System Statuses

Voicemail

Audio Store

Music On Hold

Text To Speech

CallCard Admin

Contacts

Reports

MODIFY A SHIFT

Shift ID: 24HRMIDNIGHT

Shift Name: 24 hours 7 days a week (short description of the shift) ?

Admin User Group: ---ALL--- ?

Shift Start Time: 0000

Shift End Time: 0000

Calculate Shift Length ?

Shift Length: 24:00 ?

Shift Weekdays: ?

☒ Sunday
☒ Monday
☒ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☒ Saturday

Report Option: N ?

Report Rank: 1 ?

SUBMIT

USER GROUPS USING THIS SHIFT:

[DELETE THIS SHIFT DEFINITION](#)
[Click here to see Admin changes to this shift](#)

Figure 97. VICdial Admin Shifts Modification Page

HOME | Timeslock | Logout (6666) Thursday April 26, 2012 14:01:33 PM

Show Phones | Add A New Phone | Phone Alias List | Add A New Phone Alias | Group Alias List | Add A New Group Alias

VICdial
ADMINISTRATION

Users
Campaigns
Lists
Scripts
Filters
Inbound
User Groups
Remote Agents
Admin
Call Times
Shifts
Phones
Templates
Carriers
Servers
Conferences
System Settings
Screen Labels
System Statuses
Voicemail
Audio Store
Music On Hold
Text To Speech
CallCard Admin
Contacts
Reports

VERSION: 2.4.364
BUILD: 120409-1136
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MODIFY A PHONE ALIAS RECORD: testalias

Alias ID: **testalias** ?

Alias Name: ?

Admin User Group: ?

Phones Logins List: (comma separated) ?

PHONES WITHIN THIS PHONES ALIAS:

LOGIN	EXTENSION	SERVER	PROTOCOL	IP
gs102	gs102	10.10.10.15	SP	10.10.10.16
callin	callin	10.10.10.15	EXTERNAL	10.10.10.15

[DELETE THIS PHONE ALIAS](#)

[Click here to see Admin changes to this phone alias](#)

Figure 99. VICdial Admin Phones Phone Alias Page

HOME | Timeslock | Logout (6666) Thursday April 26, 2012 14:03:36 PM

Show Phones | Add A New Phone | Phone Alias List | Add A New Phone Alias | Group Alias List | Add A New Group Alias

VICdial
ADMINISTRATION

Users
Campaigns
Lists
Scripts
Filters
Inbound
User Groups
Remote Agents
Admin
Call Times
Shifts
Phones
Templates
Carriers
Servers
Conferences
System Settings
Screen Labels
System Statuses
Voicemail
Audio Store
Music On Hold
Text To Speech
CallCard Admin
Contacts
Reports

VERSION: 2.4.364
BUILD: 120409-1136
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MODIFY A GROUP ALIAS RECORD: TestGroupAlias

Group Alias ID: **TestGroupAlias** ?

Group Alias Name: ?

Admin User Group: ?

CallerID Number: ?

CallerID Name: ?

Active:

[DELETE THIS GROUP ALIAS](#)

[Click here to see Admin changes to this group alias](#)

Figure 100. VICdial Admin Phones Group Alias Page

HOME | [Timeslot](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 14:05:13 PM

Show Templates | [Add A New Template](#)

VICdial

ADMINISTRATION

Users

Campaigns

Lists

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

Call Times

Shifts

Phones

Templates

Carriers

Servers

Conferences

System Settings

Screen Labels

System Statuses

Voicemail

Audio Store

Music On Hold

Text To Speech

CallCard Admin

Contacts

Reports

VERSION: 2.4.364

BUILD: 120409-1136

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MODIFY A CONF TEMPLATE RECORD: SIP_generic

Template ID: **SIP_generic**

Template Name:

Admin User Group:

Template Contents:

```
type=friend
host=dynamic
cancelinvite=no
context=default
```

SUBMIT

PHONES USING THIS CONF TEMPLATE:

EXTENSION	NAME	SERVER	ACTIVE
CARRIERS USING THIS CONF TEMPLATE:			
CARRIER	NAME	SERVER	ACTIVE

[DELETE THIS CONF TEMPLATE](#)
[Click here to see Admin changes to this conf template](#)

Figure 101. VICdial Admin Template Modification Page

2012-04-29 version

298

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Figure 103. VICIdial Admin Servers Modification Page

- Users
- Campaigns
- Lists
- Scripts
- Filters
- Inbound
- User Groups
- Remote Agents
- Admin**
 - Call Times
 - Shifts
 - Phones
 - Templates
 - Carriers
 - Servers
 - Conferences
 - System Settings
 - Screen Labels
 - System Statuses
 - Voicemail
 - Audio Store
 - Music On Hold
 - Text To Speech
 - CallCard Admin
 - Contacts
- Reports

VERSION: 2.4-364s
BUILD: 120409-1136
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[HOME](#) | [Timeslot](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 14:07:42 PM

[Show Conferences](#) | [Add A New Conference](#) | [Show VICIDIAL Conferences](#) | [Add A New VICIDIAL Conference](#)

MODIFY A CONFERENCE RECORD: 8600001

Conference: 8600001 ?

Server IP: 10.10.10.15 ?

Current Extension:

SUBMIT

[DELETE THIS CONFERENCE](#)

Figure 104. VICIdial Admin Conferences Modification Page

HOME | Timesclock | Logout (6666) Thursday April 26, 2012 14:47:01 PM

Screen Labels | Add A Screen Label

VICdial
ADMINISTRATION

Users
Campaigns
Lists
Scripts
Filters
Inbound
User Groups
Remote Agents
Admin
Call Times
Shifts
Phones
Templates
Carriers
Servers
Conferences
System Settings
Screen Labels
System Statuses
Voicemail
Audio Store
Music On Hold
Text To Speech
CallCard Admin
Contacts
Reports

MODIFY SCREEN LABEL:

Label ID: **Model**

Label Name: ?

Active: ☒ ?

Admin User Group: ?

Hide Label in Call Logs: ☒ ?

Label Title: ?

Label First Name: ?

Label Middle Initial: ?

Label Last Name: ?

Label Address1: ?

Label Address2: ?

Label Address3: ?

Label City: ?

Label State: ?

Label Province: ?

Label Postal Code: ?

Label Vendor Lead Code: ?

Label Gender: ?

Label Phone Number: ?

Label Phone Code: ?

Label Alt Phone: ?

Label Security Phrase: ?

Label Email: ?

Label Comments: ?

CAMPAIGNS USING THIS SCREEN LABEL:

[DELETE THIS SCREEN LABEL](#)

[Click here to see Admin changes to this screen label](#)

Figure 105. VICdial Admin Screen Label Modification Page

HOME | Timesclock | Logout (6666) Thursday April 26, 2012 14:09:46 PM

Show Voicemail Entries | Add A New Voicemail Entry

VICdial
ADMINISTRATION

Users
Campaigns
Lists
Scripts
Filters
Inbound
User Groups
Remote Agents
Admin
Call Times
Shifts
Phones
Templates
Carriers
Servers
Conferences
System Settings
Screen Labels
System Statuses
Voicemail
Audio Store
Music On Hold
Text To Speech
CallCard Admin
Contacts
Reports

MODIFY A VOICEMAIL BOX:

Voicemail ID: **2001**

Password: ?

Name: ?

Email: ?

Active: ☒ ?

Admin User Group: ?

Delete Voicemail After Email: ☒ ?

Voicemail Zone: ?

Voicemail Options: ?

New Messages: **0**

Old Messages: **0**

[DELETE THIS VOICEMAIL BOX](#)

[Click here to see Admin changes to this voicemail box](#)

VERSION: 2.4-364s
BUILD: 120409-1136
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Figure 106. VICdial Admin Voicemail Modification Page

[HOME](#) | [Timeclock](#) | [Logout \(6666\)](#)

Thursday April 26, 2012 17:51:47 PM

[close frame](#)

#	FILENAME	DATE	SIZE	PLAY
1	85100022.gsm	2012-02-21 09:27:52.	31350	PLAY
2	85100020.gsm	2012-02-21 09:27:52.	28248	PLAY
3	conf.gsm	2011-06-17 15:40:04.	3182058	PLAY
4	park.wav	2011-06-17 15:40:00.	3133908	PLAY
5	park.gsm	2011-06-17 15:40:00.	3182058	PLAY
6	85100017.gsm	2011-06-17 15:39:50.	20526	PLAY
7	85100016.gsm	2011-06-17 15:39:50.	19404	PLAY
8	conference-reservations.wav	2010-07-14 03:03:31.	26284	PLAY
9	conference-reservations.gsm	2010-07-14 03:03:31.	2706	PLAY
10	go-away2.wav	2010-07-14 03:03:31.	26284	PLAY
11	go-away2.gsm	2010-07-14 03:03:31.	2706	PLAY
12	astco-followed-by-the-hash-key.wav	2010-07-14 03:03:31.	25644	PLAY
13	astco-followed-by-the-hash-key.gsm	2010-07-14 03:03:31.	2640	PLAY
14	unavailable.wav	2010-07-14 03:03:31.	15404	PLAY
15	unavailable.gsm	2010-07-14 03:03:31.	1584	PLAY
16	flooding.wav	2010-07-14 03:03:31.	11564	PLAY
17	flooding.gsm	2010-07-14 03:03:31.	1188	PLAY
18	repeater.wav	2010-07-14 03:03:31.	12844	PLAY
19	go-away1.wav	2010-07-14 03:03:31.	22444	PLAY
20	repeater.gsm	2010-07-14 03:03:31.	1320	PLAY
21	go-away1.gsm	2010-07-14 03:03:30.	2310	PLAY

Browse... ?

Audio Store- VERSION: 2.4-5 BUILD: 111122-1332

it Mono 8k PCM WAV audio files(.wav)

ided audio file names

t

Screen Labels

System Statuses

Voicemail

Audio Store

Music On Hold

Reports

Figure 107. VICdial Admin Audio Store List Page

- [Users](#)
- [Campaigns](#)
- [Lists](#)
- [Scripts](#)
- [Filters](#)
- [Inbound](#)
- [User Groups](#)
- [Remote Agents](#)
- [Admin](#)**
 - [Call Times](#)
 - [Shifts](#)
 - [Phones](#)
 - [Templates](#)
 - [Carriers](#)
 - [Servers](#)
 - [Conferences](#)
 - [System Settings](#)
 - [Screen Labels](#)
 - [System Statuses](#)
 - [Voicemail](#)
 - [Audio Store](#)
 - [Music On Hold](#)
 - [Text To Speech](#)
 - [CallCard Admin](#)
 - [Contacts](#)
 - [Reports](#)

HOME | [Timeclock](#) | [Logout \(6666\)](#)

[Contacts](#) | [Add A Contact](#)

Thursday April 26, 2012 14:30:52 PM

MODIFY CONTACT:

First Name:	Oliver	?
Last Name:	Wendell-Douglas	?
Office Number:	5551235878	?
Cell Number:	5552323232	?
Other Number 1:	5555245858	?
Other Number 2:		?
BU Name:	Hooterville Spectator	?
Department:	Farm Equipment Sales	?
Group:	Haney Division	?
Job Title:	Tractors Specialist	?
Location:	Hooterville USA	?

SUBMIT

[DELETE THIS CONTACT](#)
[Click here to see Admin changes to this contact](#)

Figure 110. VICIdial Admin Contacts Modification Page

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